

Approval Requests

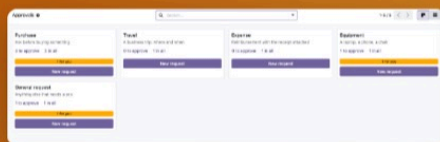
A guide to approval requests: the categories and the ways of approving, making a request, deciding, what happens after, and the access rights.

1. Start here

In plain words: "Can I buy this?" "Can I travel on the 9th?" "Please approve my receipts."

Requests like these live in WhatsApp threads and email chains, and nobody knows who said yes.

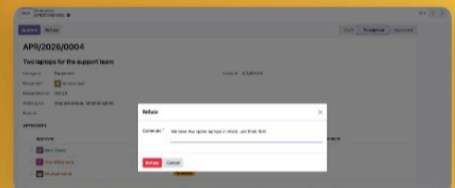
Approval Requests gives every request a home: choose a **category**, fill the few fields it needs, and the request goes to the right approvers, **one after another, any one of them or all of them**. Each decision is recorded with the date and a comment, and the requester follows the progress.



Every kind of request



Who decided, and when



A decision with a comment

The dashboard of categories, a request in progress and the decision window.

Tip: It works for anything you can describe in words: purchase, travel, expenses, equipment, leave of absence, a policy exception...

2. What you get

Feature	What it does
Categories	Purchase, Travel, Expense, Equipment and General are ready; make your own (Leave of absence, Contract signature...).
Approvers	Each category lists its approvers. A request copies them and the requester can still adjust them while it is a draft.
Three ways to approve	One after another (each approver is asked when the previous has approved), any one approver is enough, or all of them.
What a request needs	Per category: an amount, dates, a contact, a reference and an attachment can be not used, optional or required.
Decision with a comment	Approving or refusing opens a small window; a refusal needs a reason.
Nobody approves their own request	If the requester is on the list of approvers, that line is skipped; a request with no other approver cannot be submitted.
Activities and notifications	Each approver gets an activity; the requester follows the request and is notified of the final decision.
Dashboard	A card per category with the number of requests to approve and a New request button.
Lists	My requests, To approve, and All requests for managers.
Arabic	Everything is translated and works right to left.

3. Requirements

Item	Details
Odoo	19.0 (Community or Enterprise)
Apps needed	none other than Discuss (mail), installed with Odoo
License	OPL-1 (Odoo Proprietary License v1.0)

4. Install

- 1 Unzip the package. Inside is `taqnix_approval_requests.zip` ; unzip it to get the folder `taqnix_approval_requests` .
- 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 **Approval Requests** and press **Install**.

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

5. Set up the categories

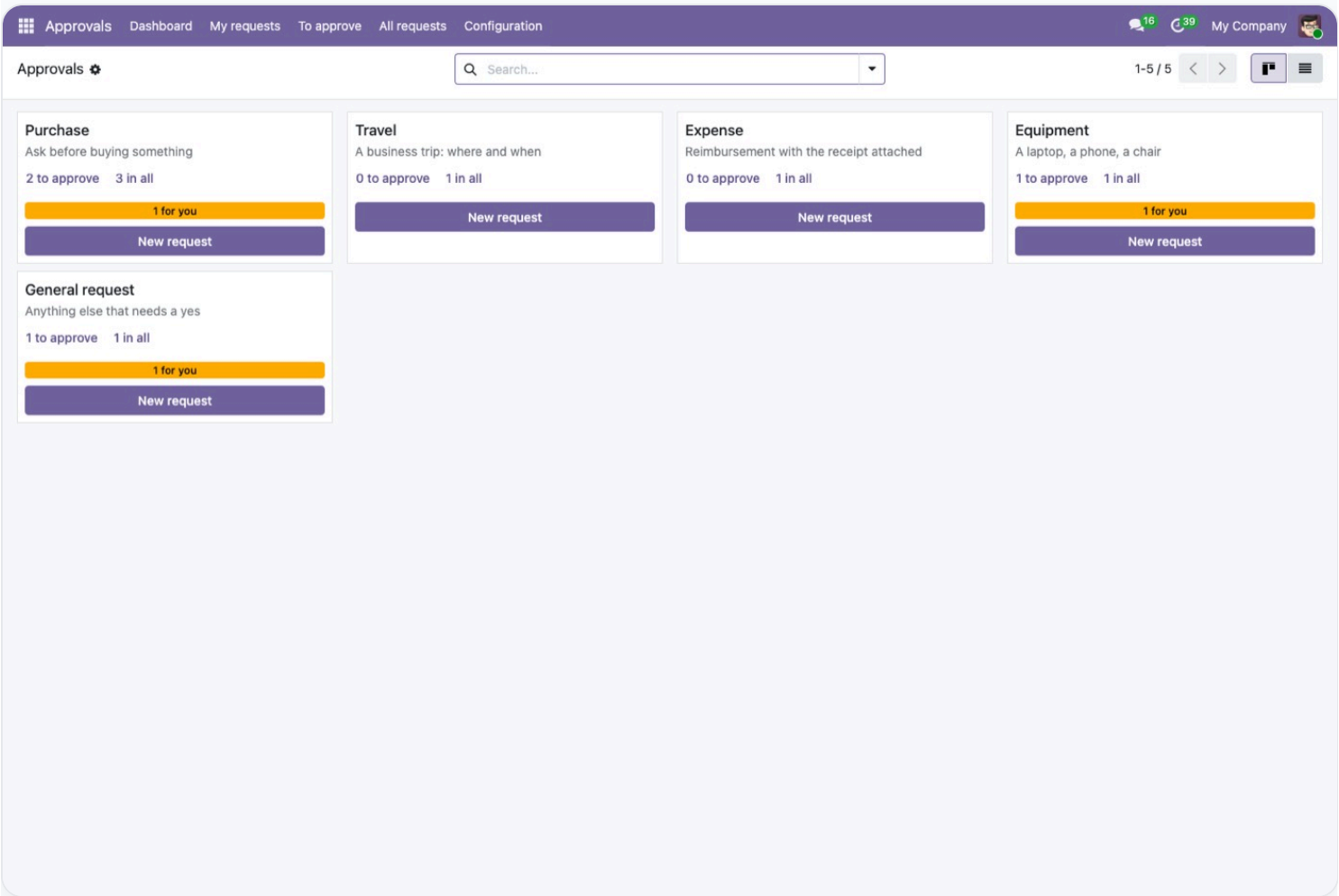
In plain words: Approvals → Configuration → Categories (managers). For each category write what it is for, choose the **way of approving**, tick what the request **asks for** and list the **approvers** in order.

A category: the way of approving, what the request asks for and the approvers.

Important: The ready categories have no approver yet: choose the people before you use them.

6. Make a request

In plain words: Open the **Dashboard**, press **New request** on the category, write the subject and the reason, fill the fields the category asks for (a required field is marked), attach the documents and press **Submit**.



The dashboard: a card per category.

Approvals

Dashboard

My requests

To approve

4

1

My Company

R

New

My requests

APR/2026/0006

1 / 1

Submit

Cancel

Draft

To approve

Approved

APR/2026/0006

Monitor arms

Category

Purchase

Amount

\$ 320.00

Requester

R Ronnie Hart

Contact

Requested on

Oct 24

Reason

Explain what you ask for and why

Attachments

Attachments

APPROVERS

Approver	State	Decided on	Comment
Tina Williamson	Waiting		
Mitchell Admin	Waiting		
Add a line			

Send message

Log note

Activity

1

R Ronnie Hart

9:50 AM

Approval request created

A request being prepared.

In plain words: The requester sees who the request waits for; approvers are asked in the order of the category.

Approvals

Dashboard

My requests

To approve

4

1

My Company

R

New

My requests

APR/2026/0001

1 / 1

Cancel

Draft

To approve

Approved

APR/2026/0001

Standing desks for the new office

Category

Purchase

Amount

\$ 1,840.00

Requester

R Ronnie Hart

Contact

Lumber Inc

Requested on

Oct 24

Waiting for

Mitchell Admin

Reason

Six height-adjustable desks for the R&D room, quote attached.

Attachments

APPROVERS

Approver	State	Decided on	Comment
T Tina Williamson	Approved	Oct 24, 9:50 AM	Good price, go ahead.
M Mitchell Admin	To decide		

Send message

Log note

Activity

Today

T Tina Williamson

9:50 AM

Tina Williamson approved the request. Good price, go ahead.

R Ronnie Hart

9:50 AM

The request was submitted.

R Ronnie Hart

9:50 AM

Approval request created

A request in progress: who has decided, who is next.

ApprovalsDashboardMy requestsTo approve

NewMy requests

Search...

1-4 / 4

☐	Number	Subject	Category	Requester	Requested on	Amount	Waiting for	State	
☐	APR/2026/0006	Monitor arms	Purchase	 Ronnie Hart	Oct 24	\$ 320.00		Draft	
☐	APR/2026/0004	Two laptops for the support team	Equipment	 Ronnie Hart	Oct 24	\$ 2,600.00	Tina Williamson, Mitchell Admin	To approve	
☐	APR/2026/0002	Customer visit in Dubai	Travel	 Ronnie Hart	Oct 24	\$ 1,200.00		Approved	
☐	APR/2026/0001	Standing desks for the new office	Purchase	 Ronnie Hart	Oct 24	\$ 1,840.00	Mitchell Admin	To approve	

My requests.

7. Decide

In plain words: The approver gets an activity and the request appears in **To approve**. Open it, read it and press **Approve** or **Refuse**; a window asks for a comment (required to refuse). A refusal ends the request and notifies the requester.

ApprovalsDashboardMy requestsTo approve

NewTo approve

Search...

1-2 / 2

☐	Number	Subject	Category	Requester	Requested on	Amount	Waiting for	State	
☐	APR/2026/0007	مقاعد مكتبية جديدة	Purchase	S Salma Khalid	Oct 24	\$ 950.00	Tina Williamson	To approve	
☐	APR/2026/0004	Two laptops for the support team	Equipment	R Ronnie Hart	Oct 24	\$ 2,600.00	Tina Williamson, Mitchell Admin	To approve	

The requests that wait for me.

ApprovalsDashboardMy requestsTo approve

New

To approve

APR/2026/0004

1 / 1<>

ApproveRefuse

DraftTo approveApproved

APR/2026/0004

Two laptops for the support team

CategoryEquipment

Amount\$ 2,600.00

RequesterR Ronnie Hart

Requested onOct 24

Waiting forTina Williamson, Mitchell Admin

Reason

APPROVERS

Approver

Marc Demo

Tina Williamson

Mitchell Admin

To decide

Send messageLog noteActivity

Planned Activities

Today: "Approve: Two laptops for the support team" for Tina Williamson

✓ Mark Done✎ Edit✕ Cancel

Today

Marc Demo 9:50 AM

Marc Demo approved the request.

Ronnie Hart 9:50 AM

The request was submitted.

Refuse

Comment ?

We have two spare laptops in stock: use them first.

Refuse

Cancel

Refusing with a reason.

Approvals

Dashboard

My requests

To approve

All requests

Configuration

16

39

My Company

New

All requests

APR/2026/0002

1 / 1

Draft

To approve

Approved

APR/2026/0002

Customer visit in Dubai

Category

Travel

Requester

R Ronnie Hart

Requested on

Oct 24

Amount

\$ 1,200.00

From

Nov 9

To

Nov 12

Company

My Company

Reason

Closing the framework agreement with the customer.

APPROVERS

Approver	State	Decided on	Comment
Marc Demo	Approved	Oct 24, 9:50 AM	
Mitchell Admin	Approved	Oct 24, 9:50 AM	

Send message

Log note

Activity

Today

Mitchell Admin

9:50 AM

Subject: APR/2026/0107

The request is approved.

Mitchell Admin

9:50 AM

Mitchell Admin approved the request.

Marc Demo

9:50 AM

Marc Demo approved the request.

R Ronnie Hart

9:50 AM

An approved request: every decision is kept.

A refused request, with the reason.

In plain words: The requester can **Cancel** a request that is not decided and **Ask again** after a refusal or a cancellation: the approvers come back to waiting and the request starts again. A manager can do both for the requester. A request that was decided is never changed, and only drafts and cancelled requests can be deleted.

Approvals Dashboard My requests To approve All requests Configuration 16 39 My Company								
New All requests		Q Search...			1-7 / 7 < >			
☐	Number	Subject	Category	Requester	Requested on	Amount	Waiting for	State
☐	APR/2026/0007	مقاعد مكتبية جديدة	Purchase	S Salma Khalid	Oct 24	\$ 950.00	Tina Williamson	To approve
☐	APR/2026/0006	Monitor arms	Purchase	R Ronnie Hart	Oct 24	\$ 320.00		Draft
☐	APR/2026/0005	Allow remote work on Fridays	General request	T Tina Williamson	Oct 24	\$ 0.00	Mitchell Admin	To approve
☐	APR/2026/0004	Two laptops for the support team	Equipment	R Ronnie Hart	Oct 24	\$ 2,600.00	Tina Williamson, Mitchell Admin	To approve
☐	APR/2026/0003	Taxi and meals - conference	Expense	A Anita Oliver	Oct 24	\$ 214.50		Refused
☐	APR/2026/0002	Customer visit in Dubai	Travel	R Ronnie Hart	Oct 24	\$ 1,200.00		Approved
☐	APR/2026/0001	Standing desks for the new office	Purchase	R Ronnie Hart	Oct 24	\$ 1,840.00	Mitchell Admin	To approve

All requests, for managers.

9. Who can do what

Who	Can
Everybody (internal users)	Make requests, see their own, see and decide the requests where they are an approver.
Approvals managers	See all the requests, make the categories, cancel or ask again for others. Administrators are managers.
Others	See nothing of other people's requests.

10. Arabic and right to left

My Company

الإعداداتلوحة المعلوماتطلباتللاعتماكل الطلباتالإعدادات

1 / 1

جديدملبأىAPR/2026/0007

معلقة

معلقة

معلقة

APR/2026/0007

مقاعد مكتبية جديدة

شراء

مقدم الطلب

تاريخ الطلب

بانتظار

السبب

المرفقات

المستخدمون

المبلغ

جهة الاتصال

الحالة

المعلق

\$ 950.00

Salma Khalid

٢٤ أكتوبر

Tina Williamson

استبدال سنة مقاعد في قاعة الاجتماعات.

المرفقات

المستخدمون

الحالة

المعلق

تعلق

أزرو في

القرار

ينتظر

2

إرسال رسالة

ملاحظة

النشاط

الأنشطة المخطط لها

Tina Williamson

اليوم: "اعتمد: مقاعد مكتبية جديدة"

إلغاء

تحرير

التعيين كمكتمل

اليوم

Salma Khalid

أرسل الطلب.

Salma Khalid

A request in an Arabic interface.

11. Limits

Limit	Detail
No automatic action	An approved request is a record: the module does not buy, book or pay.
No amount limits	Every request of a category follows the same approvers; make two categories for small and large amounts.
Approvers are users	An approver needs an Odoo user.
Changing a category	The way of approving of a request in progress does not change when you edit the category.

12. For developers

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

```
category = env.ref('taqnix_approval_requests.category_purchase')
request = env['taqnix_approval.request'].create({'category_id': category.id, 'subject': '
request.action_submit()                # the first approver gets an activity
request.approval_line_ids.filtered(lambda l: l.state == 'pending').user_id
env['taqnix_approval.decision'].create({'request_id': request.id, 'decision': 'approve',
```

13. Troubleshooting

Problem	What to do
Add at least one approver	The category has no approver: add them in the category or on the draft request.
Nobody can approve their own request	The only approver is the requester: add somebody else.
This category needs: ...	A required field is empty.
It is not your turn to decide	A previous approver has not decided yet (one after another), or you already decided.

14. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_approval_requests` . The categories and the requests are kept.

15. 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

- Categories of requests with approvers and a way of approving: one after another, any, all
- Required fields per category: amount, dates, contact, reference, attachment

- Decisions with comments, activities, notifications, history
- Dashboard of categories; my requests, to approve, all requests
- Nobody approves their own request; cancel and ask again
- Arabic translation, automated tests

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