

Purchase Approval

A guide to the approval of purchase orders: defining levels, asking for approval, approving and rejecting, what happens when a purchase order changes, and the settings.

1. Start here

In plain words: A purchase order for a big amount, or with a big discount, should not be confirmed without a manager's OK. This module adds that OK to Odoo: you define **approval levels**, the buyer presses **Request approval**, the approvers are asked one after the other, and the purchase order **cannot be confirmed** until every level has approved it.

Send RFQ Confirm Order Print Cancel Request approval

🔒 Approval needed Levels: Purchase manager

1. Over the limit: approval needed

Send RFQ Confirm Order Print Cancel Reset approval

✅ Approved You can confirm this purchase order.

3. Approved: confirm it

Send RFQ Confirm Order Print Cancel Reset approval

⌚ Waiting for approval from Mia Roberts

2. Waiting for the approver

Send RFQ Confirm Order Print Cancel Request approval

❌ Rejected A cheaper supplier quoted 2,300 per table. Please ren

4. Rejected, with the reason

The four states of a purchase order: approval needed, waiting, approved and rejected with the reason.

Tip: The approval is tied to the amount: if the total or a discount changes after approval, the purchase order must be approved again.

2. What you get

Feature	What it does
Approval levels	By order total, by the highest line discount, or both.
Several levels in sequence	A 5,000 order needs the purchase manager; a 20,000 order needs the purchase manager and then the director.
Hard stop	Confirm is refused until the purchase order is approved. Vendors are not affected: the guard is for your own users.
Activities and notes	Each approver gets a task; every step is written in the chatter.
Reasons for rejection	A rejection needs a reason, which the buyer sees.
Approval is cancelled by a change	A different total or discount asks for a new approval.
To Approve list	Each approver sees the purchase orders waiting for them, even those of colleagues.
Settings	Switch it off, confirm automatically when approved, allow buyers to approve their own.

3. Requirements

Item	Details
Odoo	19.0 (Community or Enterprise)
Apps needed	Purchase (purchase)
Approvers	Internal users with access to Purchase
License	OPL-1 (Odoo Proprietary License v1.0)

4. Install

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

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

Tip: After installing nothing changes for your team until you add at least one approval level.

5. Define the approval levels

In plain words: Open **Purchase** → **Configuration** → **Approval Levels**. Each line is a level: who approves, and when it applies.

Purchase

Orders

Products

Reporting

Configuration

12

17

My Company (San Francisco)

New

Approval Levels

Q

Search...

1-3 / 3

Level	Order total fr...	Discount fr...	Approvers	Company
Discount over 15% \$ 0.00 15.00 S Salma Khalid My Company (San Francisco)				
Purchase manager \$ 5,000.00 0.00 M Mia Roberts My Company (San Francisco)				
Director \$ 20,000.00 0.00 D Dan Whitaker My Company (San Francisco)				

Three levels: a discount rule, the purchase manager from 5,000 and the director from 20,000.

Purchase Orders Products Reporting Configuration					12 17 My Company (San Francisco)	
New Approval Levels Director					1 / 1	

Director

WHEN DOES THIS LEVEL APPLY?

Order total from ? \$ 20,000.00

Discount from (%) ? 0.00

WHO APPROVES?

Sequence ? 20

Approvers ? D Dan Whitaker

Company My Company (San Francisco)

The level applies when the order total reaches the amount or a line reaches the discount. Levels that apply are asked one after the other, in the order of their sequence.

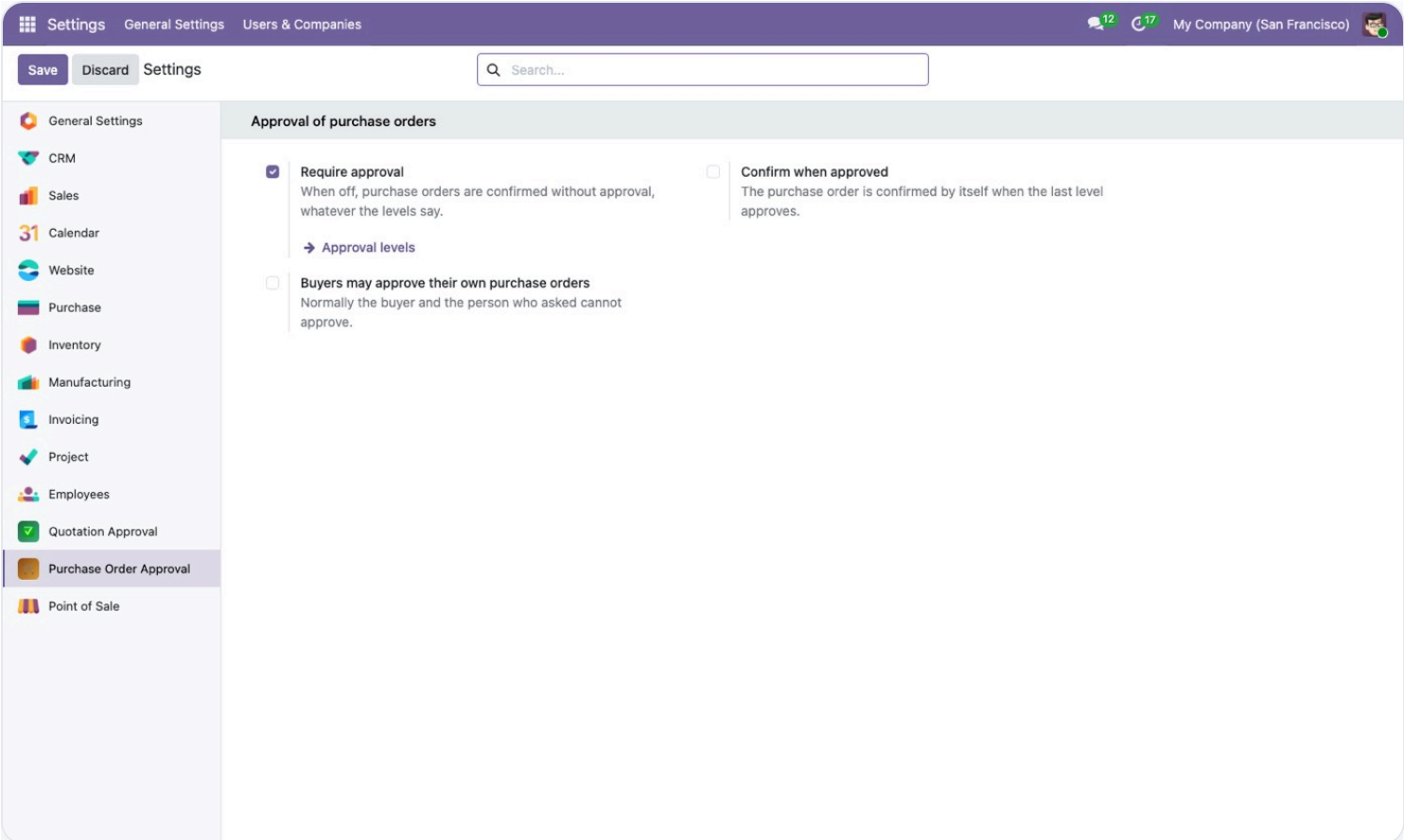
One level.

Field	Meaning
Level	The name shown to everyone, for example "Purchase manager".
Order total from	The level applies when the order total (in the company currency) is at least this amount. 0 ignores the amount.
Discount from (%)	The level applies when any line has at least this discount. 0 ignores the discount.
Approvers	Any one of them can approve the level. They must have access to Purchase.
Sequence	Levels that apply are asked in this order.

Tip: A level applies when the total reaches the amount **or** a line reaches the discount. Levels add up: a 26,000 order needs both the purchase manager and the director.

6. Settings

In plain words: Open **Settings** → **Purchase Order Approval**.



Approval on or off, confirm when approved, self-approval.

Setting	What it does
Require approval	Switch the whole approval off for the company.
Confirm when approved	The purchase order is confirmed as soon as the last level approves.
Buyers may approve their own purchase orders	Off by default: the buyer and the person who asked cannot approve. If a level has no one else to approve, the request is refused with a message.

7. The buyer asks for approval

In plain words: When a purchase order reaches a level, a banner says so and **Request approval** appears. Confirm is refused until it is approved.

PurchaseOrdersProducts

7My Company (San Francisco)

NewRequests for QuotationP00218

1/1<>

Send RFQConfirm OrderPrintCancelRequest approval

RFQRFQ SentPurchase Order

Send messageLog noteActivity

Approval needed Levels: Purchase manager

Request for Quotation
☆ P00218

Vendor ?Ironwood Suppliers

Order Deadline ?Oct 23, 10:52 AM

Vendor Reference ?

Expected Arrival ?Oct 23, 10:52 AMNo data yet

CurrencyUSD

☐ Ask confirmation

Deliver To ?YourCompany: Receipts

ProductsOther Information

Product	Quantity	Unit Price	Taxes	Amount
Conference Table	3.00	2,400.00		\$ 7,200.00
Add a productAdd a sectionAdd a noteCatalog				

Define your terms and conditions ...

Untaxed Amount: \$ 7,200.00
Total: \$ 7,200.00

Today

Sam Carter 10:52 AMPurchase Order created

A 7,200 purchase order: the purchase manager must approve.

PurchaseOrdersProducts

7My Company (San Francisco)

NewRequests for QuotationP00218

1/1<>

Send RFQConfirm OrderPrintCancelRequest approval

RFQRFQ SentPurchase Order

Send messageLog noteActivity

Approval needed Levels: Purchase manager

Request for Quotation
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CurrencyUSD

ProductsOther Information

Product	Quantity	Unit Price	Taxes	Amount
Conference Table	3.00	2,400.00		\$ 7,200.00
Add a productAdd a sectionAdd a noteCatalog				

Define your terms and conditions ...

Untaxed Amount: \$ 7,200.00
Total: \$ 7,200.00

Today

Sam Carter 10:52 AMPurchase Order created

Invalid Operation

P00218 needs approval (Purchase manager). Press "Request approval" first.

Close

Pressing Confirm first explains what to do.

Purchase
Orders
Products

8
My Company (San Francisco)

New
Requests for Quotation
P00218
1 / 1

Send RFQ
Confirm Order
Print
Cancel
Reset approval

RFQ
RFQ Sent
Purchase Order

Send message
Log note
Activity

Waiting for approval from Mia Roberts

Request for Quotation
P00218

Vendor
Ironwood Suppliers

Vendor Reference

Currency
USD

Order Deadline
Oct 23, 10:52 AM

Expected Arrival
Oct 23, 10:52 AM
No data yet

☐ Ask confirmation

Deliver To
YourCompany: Receipts

Products
Other Information
Approval

Product	Quantity	Unit Price	Taxes	Amount
Conference Table	3.00	2,400.00		\$ 7,200.00

Add a product
Add a section
Add a note
Catalog

Define your terms and conditions ...

Untaxed Amount:
Total:

\$ 7,200.00
\$ 7,200.00

Planned Activities

Today: "Approve purchase order P00218" for Mia Roberts
Purchase manager: \$ 7,200.00 for Ironwood Suppliers.
Mark Done
Edit
Cancel

Today

Sam Carter 10:52 AM
Approval requested by Sam Carter: Purchase manager.

Sam Carter 10:52 AM
Purchase Order created

After Request approval: waiting for the purchase manager.

Situation	What happens
Request approval	The steps are created, the first level is asked and gets a task.
Two levels	The second level is asked only when the first has approved.
Confirm before approval	A message explains that approval is needed or pending.
Reset approval	Clears the steps so you can ask again, for example after changing the purchase order.

8. The approver approves or rejects

In plain words: Purchase → Orders → To Approve lists the purchase orders waiting for you,

also those of your colleagues.

Purchase Orders Products Reporting Configuration									
New To Approve		Search...						1-2 / 2	
	Reference	Confirmation Date	Vendor	Next Activity	Buyer	Total	Approval	Status	Expected Arrival
☐	P00219		Atlas Comp...	☒ Approve purchase order P002...	Sam Carter	\$ 26,580.00	Waiting for a...	RFQ	Oct 23, 10:52 AM
☐	P00218		Ironwood S...	☒ Approve purchase order P002...	Sam Carter	\$ 7,200.00	Waiting for a...	RFQ	Oct 23, 10:52 AM
						\$ 33,780.00			

The purchase orders waiting for me.

PurchaseOrdersProductsReportingConfiguration

72My Company (San Francisco)

NewRequests for QuotationP00219

1/1<>

Send RFQConfirm OrderPrintCancelApproveRejectReset approval

RFQRFQ SentPurchase Order

Send messageLog noteActivity

Waiting for approval from Mia Roberts

Request for Quotation
☆ P00219

VendorAtlas Components

Order DeadlineOct 23, 10:52 AM

Vendor Reference

Expected ArrivalOct 23, 10:52 AMNo data yet

CurrencyUSD

☐ Ask confirmation

Deliver ToYourCompany: Receipts

ProductsOther InformationApproval

Product	Quantity	Unit Price	Taxes	Amount
Conference Table	10.00	2,400.00		\$ 24,000.00
Ergonomic Chair	6.00	430.00		\$ 2,580.00
Add a productAdd a sectionAdd a noteCatalog				

Define your terms and conditions ...

Untaxed Amount: \$ 26,580.00
Total: \$ 26,580.00

Planned Activities

Today: "Approve purchase order P00219" for Mia Roberts
Purchase manager: \$ 26,580.00 for Atlas Components.
✓ Mark Done✎ Edit✕ Cancel

Today

Sam Carter 10:52 AM
Approval requested by Sam Carter: Purchase manager → Director.

Sam Carter 10:52 AM
Purchase Order created

The approver sees Approve and Reject.

PurchaseOrdersProductsReportingConfiguration

81My Company (San Francisco)

NewRequests for QuotationP00219

1/1<>

Send RFQConfirm OrderPrintCancelReset approval

RFQRFQ SentPurchase Order

Send messageLog noteActivity

Waiting for approval from Dan Whitaker

Request for Quotation
☆ P00219

VendorAtlas Components

Order DeadlineOct 23, 10:52 AM

Vendor Reference

Expected ArrivalOct 23, 10:52 AMNo data yet

CurrencyUSD

☐ Ask confirmation

Deliver ToYourCompany: Receipts

ProductsOther InformationApproval

Product	Quantity	Unit Price	Taxes	Amount
Conference Table	10.00	2,400.00		\$ 24,000.00
Ergonomic Chair	6.00	430.00		\$ 2,580.00
Add a productAdd a sectionAdd a noteCatalog				

Define your terms and conditions ...

Untaxed Amount: \$ 26,580.00
Total: \$ 26,580.00

Planned Activities

Today: "Approve purchase order P00219" for Dan Whitaker
Director: \$ 26,580.00 for Atlas Components.
✓ Mark Done✎ Edit✕ Cancel

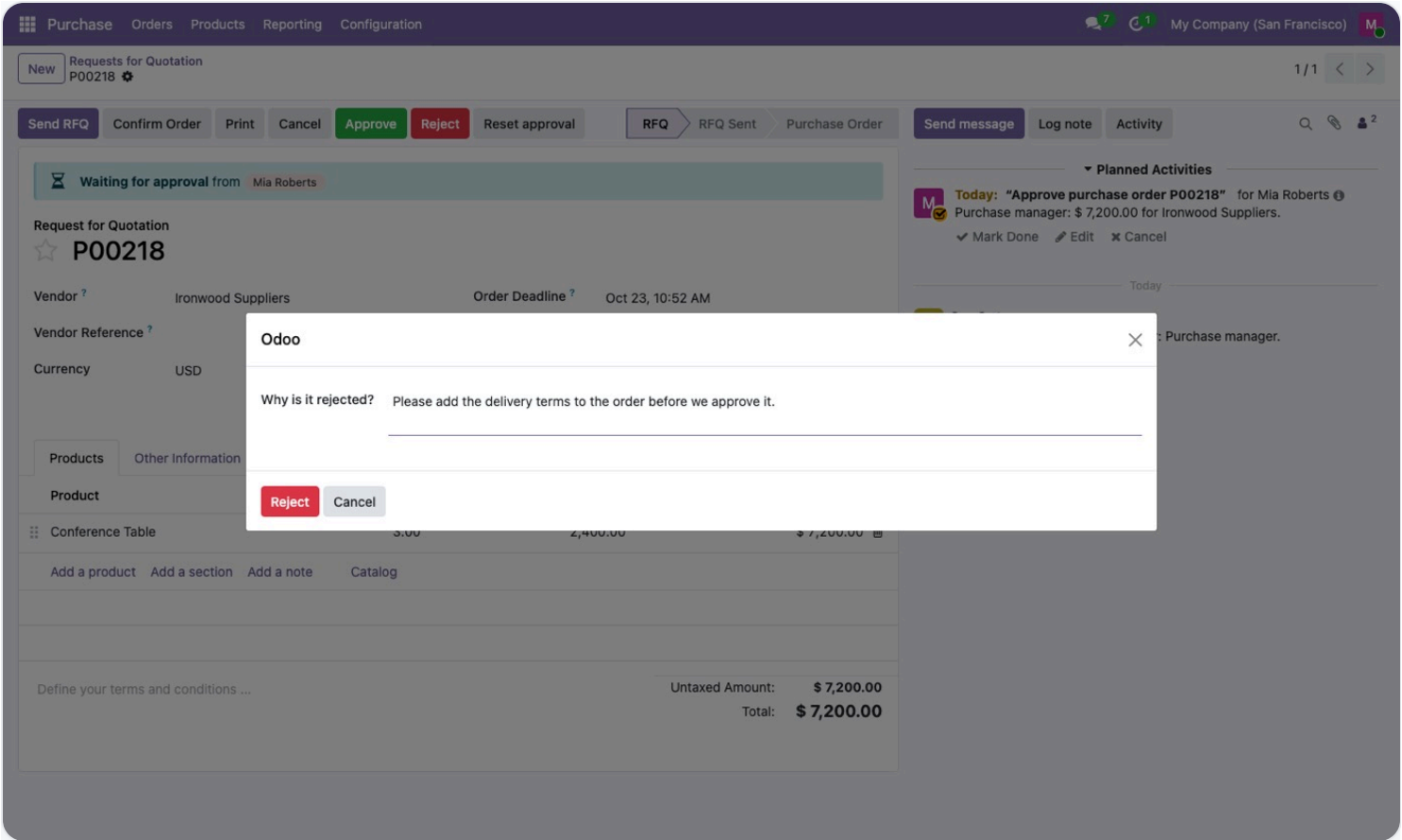
Today

Mia Roberts 10:53 AM
Mia Roberts approved the level "Purchase manager". Waiting for "Director".

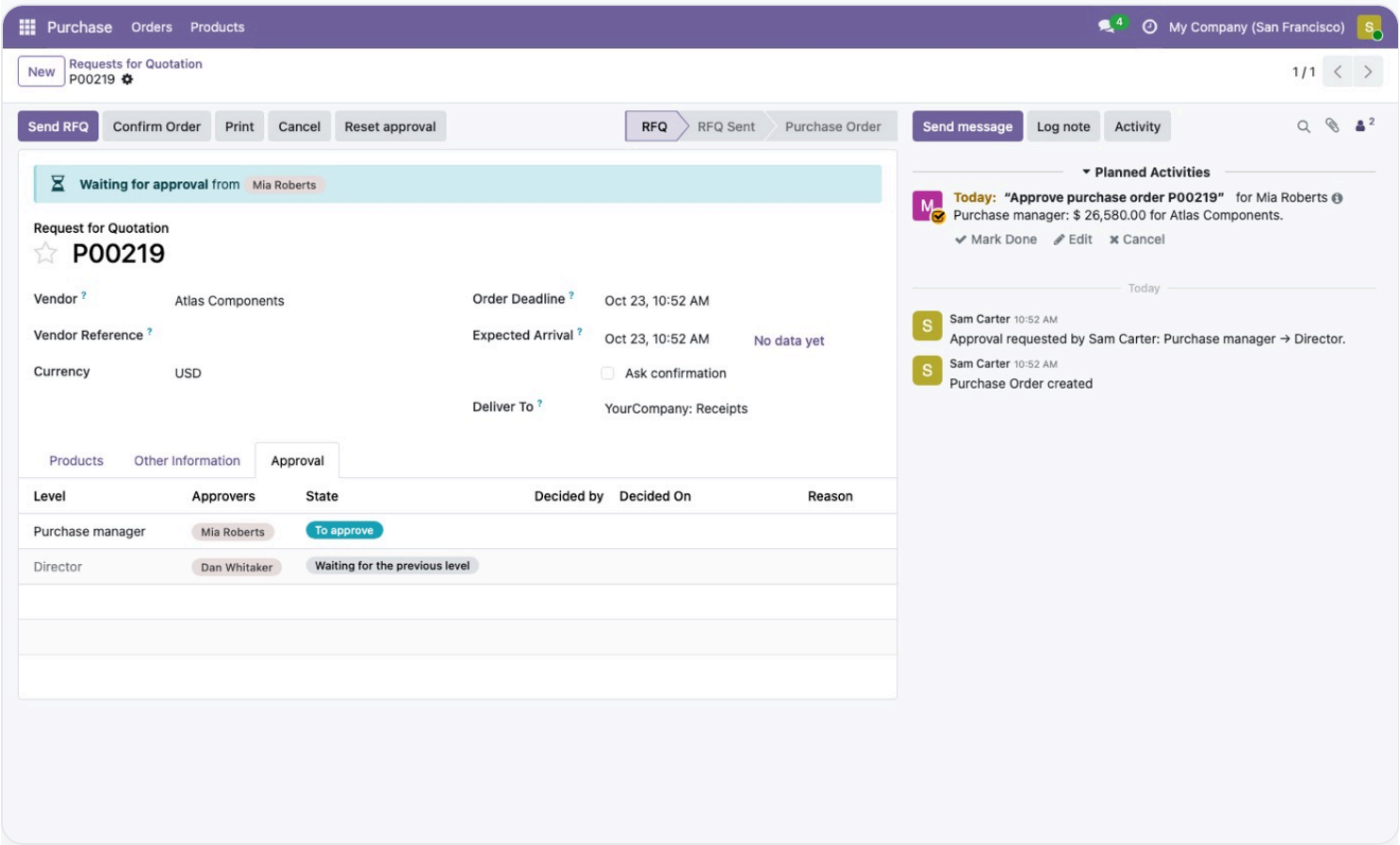
Sam Carter 10:52 AM
Approval requested by Sam Carter: Purchase manager → Director.

Sam Carter 10:52 AM
Purchase Order created

After the first level approved, the purchase order waits for the director.



A rejection needs a reason.



The Approval tab shows every level, who decides, and the state.

9. Approved, or sent back

PurchaseOrdersProductsReportingConfiguration

8My Company (San Francisco)

New

Requests for QuotationP00219

1 / 1

Send RFQConfirm OrderPrintCancelReset approval

RFQRFQ SentPurchase Order

Send messageLog noteActivity

Approved You can confirm this purchase order.

Request for Quotation

☆ P00219

VendorAtlas Components

Order DeadlineOct 23, 10:52 AM

Vendor Reference

Expected ArrivalOct 23, 10:52 AM

CurrencyUSD

Deliver ToYourCompany: Receipts

Ask confirmation

No data yet

ProductsOther InformationApproval

Product	Quantity	Unit Price	Taxes	Amount
Conference Table	10.00	2,400.00		\$ 24,000.00
Ergonomic Chair	6.00	430.00		\$ 2,580.00

Add a product

Add a section

Add a note

Catalog

Define your terms and conditions ...

Untaxed Amount: \$ 26,580.00

Total: \$ 26,580.00

Today

D Dan Whitaker 10:53 AM

Dan Whitaker approved the level "Director". The purchase order is approved.

M Mia Roberts 10:53 AM

Mia Roberts approved the level "Purchase manager". Waiting for "Director".

S Sam Carter 10:52 AM

Approval requested by Sam Carter: Purchase manager → Director.

S Sam Carter 10:52 AM

Purchase Order created

Every level approved: the purchase order can be confirmed. The chatter shows who approved what.

Purchase
Orders
Products

4
My Company (San Francisco)

New
Requests for Quotation
P00221
1 / 1

Send RFQ
Confirm Order
Print
Cancel
Request approval
Reset approval
RFQ
RFQ Sent
Purchase Order

Send message
Log note
Activity

✖ Rejected A cheaper supplier quoted 2,300 per table. Please renegotiate before we approve.

Request for Quotation
☆ P00221

Vendor ?
Delta Metals
Order Deadline ?
Oct 23, 10:52 AM

Vendor Reference ?
Expected Arrival ?
Oct 23, 10:52 AM
No data yet

Currency
USD
Deliver To ?
YourCompany: Receipts

Products
Other Information
Approval

Product	Quantity	Unit Price	Taxes	Amount
Conference Table	4.00	2,450.00		\$ 9,800.00

Add a product
Add a section
Add a note
Catalog

Define your terms and conditions ...

Untaxed Amount: \$ 9,800.00
Total: \$ 9,800.00

Today

Mia Roberts 10:52 AM
Mia Roberts rejected the level "Purchase manager".
Reason: A cheaper supplier quoted 2,300 per table. Please renegotiate before we approve.

Sam Carter 10:52 AM
Approval requested by Sam Carter: Purchase manager.

Sam Carter 10:52 AM
Purchase Order created

A rejected purchase order shows the reason. Change it and press Request approval again.

Purchase
Orders
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Reporting
Configuration

8
My Company (San Francisco)

New
Requests for Quotation
P00219
1 / 1

Send RFQ
Confirm Order
Print
Cancel
Reset approval
RFQ
RFQ Sent
Purchase Order

Send message
Log note
Activity

✔ Approved You can confirm this purchase order.

Request for Quotation
☆ P00219

Vendor ?
Atlas Components
Order Deadline ?
Oct 23, 10:52 AM

Vendor Reference ?
Expected Arrival ?
Oct 23, 10:52 AM
No data yet

Currency
USD
Deliver To ?
YourCompany: Receipts

Products
Other Information
Approval

Product	Quantity	Unit Price	Taxes	Amount
Conference Table	10.00	2,400.00		\$ 24,000.00
Ergonomic Chair	6.00	430.00		\$ 2,580.00

Add a product
Add a section
Add a note
Catalog

Define your terms and conditions ...

Untaxed Amount: \$ 26,580.00
Total: \$ 26,580.00

Today

Dan Whitaker 10:53 AM
Dan Whitaker approved the level "Director". The purchase order is approved.

Mia Roberts 10:53 AM
Mia Roberts approved the level "Purchase manager". Waiting for "Director".

Sam Carter 10:52 AM
Approval requested by Sam Carter: Purchase manager → Director.

Sam Carter 10:52 AM
Purchase Order created

Every step is written in the chatter.

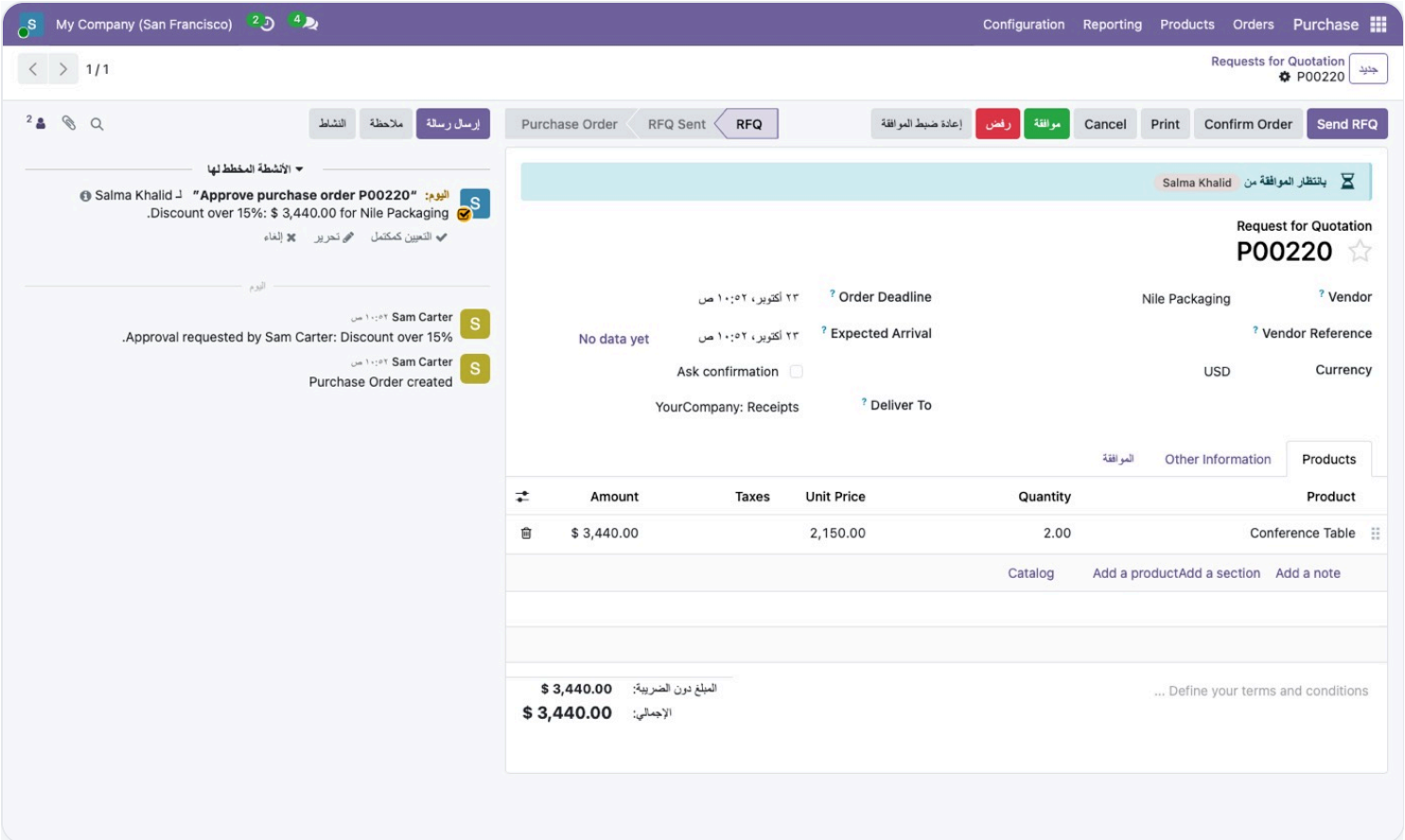
Tip: The buyer and the person who asked are notified when the purchase order is approved or rejected.

10. When the purchase order changes

Change	Result
The total or a discount goes up or down after approval	The banner says the purchase order changed. It must be approved again to be confirmed.
The purchase order no longer reaches any level	It can be confirmed without approval.
The purchase order is cancelled or set back to draft	The approval steps are cleared.
The purchase order is duplicated	The copy starts without approval.

11. Arabic and right to left

In plain words: The levels, buttons, banners, notes and settings are translated, and the banner follows the direction of the language.



A purchase order waiting for an approver whose interface is in Arabic.

12. Who can do what

Who	What they can do
Buyers	Request approval for their purchase orders, reset it.
Approvers	See and approve or reject the purchase orders waiting for them, even if they belong to a colleague.
Purchase managers	Define the approval levels and the settings.
Vendors (portal)	Are not affected: the guard applies to your own users.

13. Limits

Limit	Detail
Purchase orders only	It guards the Confirm Order button of requests for quotation. Sales quotations have their own module.
Any one approver per level	A level is approved by any one of its approvers; there is no “two out of three”.
Internal confirmations are guarded	Everything that confirms a purchase order as an internal user is blocked, including server actions.
Currency	Amounts are compared in the company currency.

14. For developers

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

Item	Details
Models	<code>taqnix.purchase.approval.rule</code> (a level), <code>taqnix.purchase.approval.line</code> (a step of one purchase order).
Order fields	<code>tx_approval_state</code> , <code>tx_banner</code> , <code>tx_current_approver_ids</code> , <code>tx_approval_needed</code> .
Methods	<code>action_tx_request_approval</code> , <code>action_tx_approve</code> , <code>action_tx_reset_approval</code> ; the guard is <code>_tx_check_approval</code> .

```
# approve from your own code, as the approver
order.with_user(manager).action_tx_approve()

# which levels does a purchase order need?
order._tx_required_rules().mapped('name')
```

15. Troubleshooting

Problem	What to do
Nothing is asked for approval	Check that a level exists, that its amount or discount is reached, and that Require approval is on.
Request approval says nobody can approve	The only approver is the buyer or you. Add another approver, or allow self-approval in the settings.
An approver cannot find the purchase order	Use Purchase → Orders → To Approve. The approver needs access to Purchase.
The purchase order was approved but cannot be confirmed	The total or a discount changed after approval. Request approval again.
A level cannot be saved	A level needs an amount or a discount, and every approver needs access to Purchase.

16. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_purchase_approval` . Levels and settings are kept. To remove it, uninstall it from Apps: the levels and the approval history are deleted with it, and purchase orders can be confirmed freely again.

17. 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

- Approval levels by order total and discount
- Sequential levels, tasks for approvers, To Approve list
- Confirm is refused until every level approved; changes after approval ask again
- Rejection reasons, chatter history and an Approval tab
- Settings: switch off, confirm when approved, self-approval
- Arabic translation, automated tests