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| Odoo Ver. | 18.0 |
| Module Name | hamesha\_po\_approval |
| Description | Custom Purchase Order Approval Workflow for Hamesha |

# User Group

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This module defines three custom user groups to control access and approval permissions at each stage of the Purchase Order (PO) workflow:

* PO Manager Approver (group\_po\_manager)  
  - Authorized to approve Purchase Orders with a total value of less than IDR 5 million.
* PO Department Head (group\_po\_dept\_head)  
  - Responsible for approving Purchase Orders with a value between IDR 5 million and 20 million as the first-level approver before it moves to CFO.
* PO CFO Approver (group\_po\_cfo)  
  - Authorized to approve POs valued more than IDR 20 million directly and second-level approval for POs between 5–20 million.

These groups can be assigned in Odoo via: Settings > Users > Select User > Access Rights tab > Other section

# Purchase Order Approval Workflow – Key Features

## Model Extension: purchase.order

* Field po\_approval\_status (Selection) for tracking PO approval status:
* open – Draft / not yet submitted
* pending\_approval\_manager – Waiting for Manager Approval
* pending\_approval\_dept\_head – Waiting for Dept. Head Approval
* pending\_approval\_cfo – Waiting for CFO Approval
* approved – Approved
* rejected – Rejected
* Field reject\_note is used to store rejection reason, logged in Chatter.

## Approval Routing Logic

|  |  |  |  |
| --- | --- | --- | --- |
| PO Amount (IDR) | Status on Submit | Required Approval Flow | Group Required |
| < 5,000,000 | pending\_approval\_manager | Manager | group\_po\_manager |
| 5,000,000 – 20,000,000 | pending\_approval\_dept\_head | Dept. Head → CFO | group\_po\_dept\_head, group\_po\_cfo |
| > 20,000,000 | pending\_approval\_cfo | CFO | group\_po\_cfo |

## Email Notification

* On submission, an email is sent to users in the appropriate group (Manager, Dept. Head, or CFO).
* Email Template Used: mail\_template\_po\_submit

## Approval Action (btn\_approve)

* Checks current user’s access group and PO approval status.
* Logs approver name in Chatter.
* Dept. Head → sets status to pending\_approval\_cfo.
* Final approval → sets status to approved.

## Reject Action (btn\_reject)

* Triggers a popup wizard to collect the rejection reason.
* Saves rejection reason in reject\_note.
* Logs rejection message in Chatter.

Below is a visual example of how this feature is implemented in Odoo:

## Manager ( < 5,000,000)

1. Manager Approved (<5,000,000)

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1. Manager Reject (<5,000,000)

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1. Validation

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## Dept Head -> CFO (5,000,000 – 20,000,000)

1. Submit Approval

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1. Dept Head Approved, continue to CFO

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1. CFO Approved. Done

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## CFO ( >20,000,000)

1. Submit Approval

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1. CFO Approved

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