

How to Set Up an Approval Workflow in Odoo

This guide shows you how to set up an approval workflow in Odoo using the Approvals app. You will learn how to review pending requests, approve or track them as a manager, monitor your own submissions, and audit the full history of approved and refused requests across your organization.

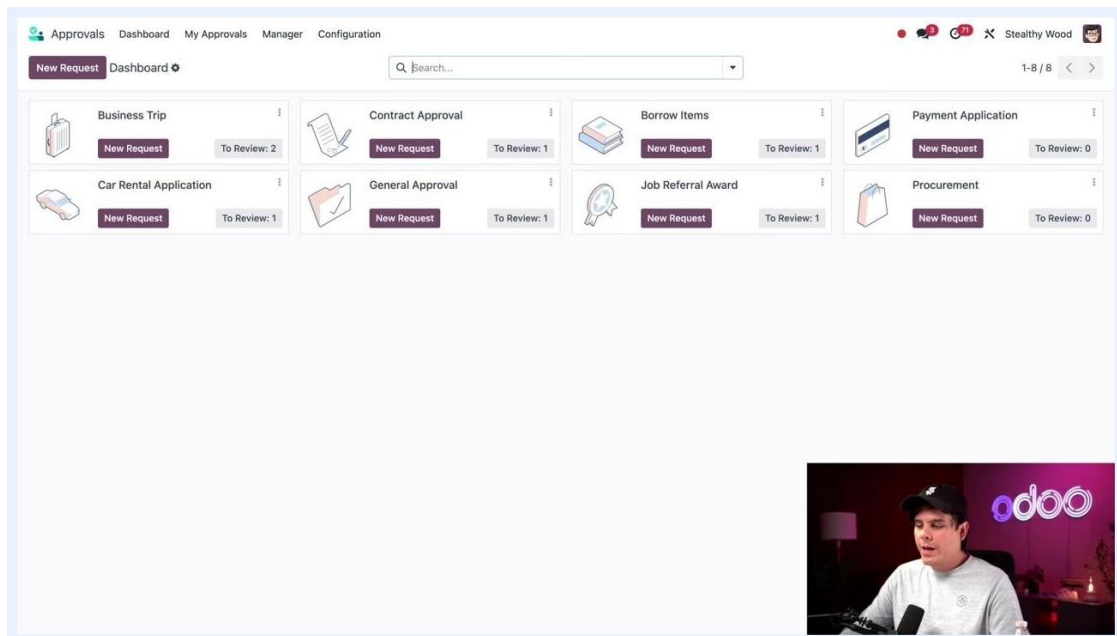
Prerequisites

- Access to the Odoo **Approvals** app.
- Approval categories already configured (for example, Business Trip, Contract Approval, Borrow Items, Car Rental Application, General Approval, or Job Referral Award).
- Manager-level access if you need to review and approve requests submitted by others.

Part 1: Reviewing approval categories and pending requests

Step 1: Access the Approvals dashboard

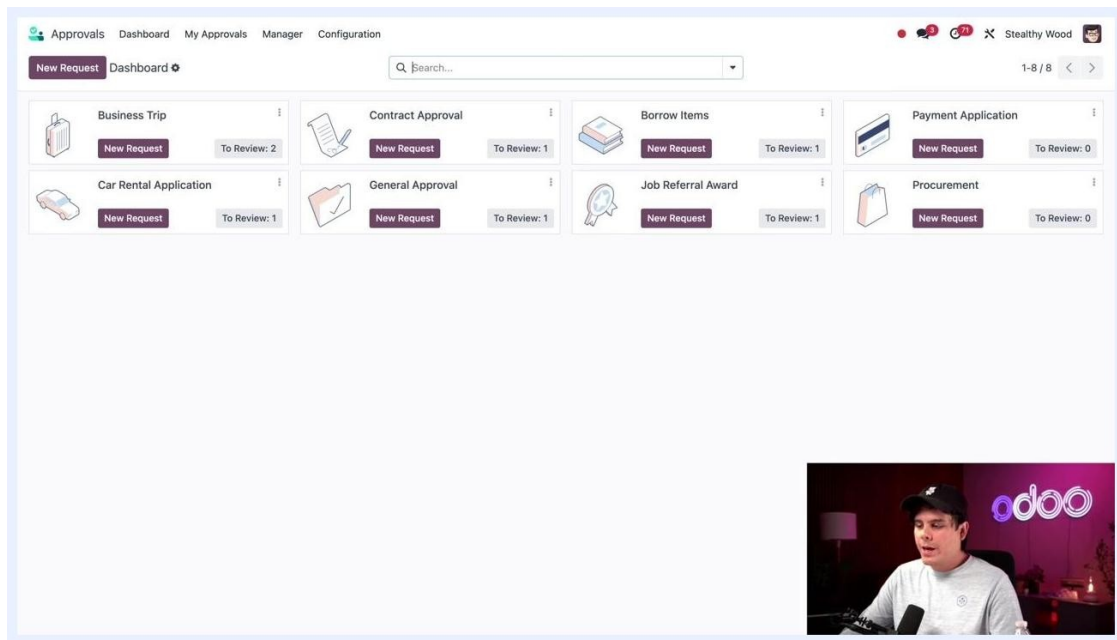
Open the **Approvals** app to view all the approval categories configured in your system. Each category displays a **To Review** indicator showing how many requests are currently pending (for example, "Business Trip" shows "To Review: 2" and "Contract Approval" shows "To Review: 1").



Odoo Approvals dashboard showing categories, new request buttons, and pending review counts

Step 2: Open the requests awaiting your action

Click **To Review** on a specific category, such as "Contract Approval," to see the list of requests waiting to be approved. Each row shows the Approval Subject, Request Owner, Category, Request Start, Request To, and Request Status. In this example, all listed requests are in "Submitted" status, including items such as Amazon Voucher, Borrow Screwdriver, Car Rental - Client Visits, London Furniture Show, New Marketing Partnership, Training Class - Accounting, and Use Lathe Station After Hours.



List of approval requests with details such as subject, owner, category, dates, and status

Step 3: Review a request's details

Click on a specific request, such as "New Marketing Partnership" submitted by Anita Oliver, to open its details. You will see the Approval Subject, Request Owner, Category, Contact, Amount (3,000.00), Reference (FurnitureReviewsPlus), Description, and Status ("Submitted").

Step 4: Check the required approvers

Click the **Approver(s)** tab to see who must approve the request. In this example, both Mitchell Admin and Carol Smith are required approvers, and both currently show the status "To Approve."

The screenshot shows a web application interface for managing approvals. At the top, there's a navigation bar with links like 'Approvals', 'Dashboard', 'My Approvals', 'Manager', and 'Configuration'. Below this, a breadcrumb trail indicates the current location: 'Dashboard / Approvals to review / New Marketing Partnership'. The main content area is divided into two sections. The left section, titled 'Approval Subject', displays details for a 'New Marketing Partnership' request. It includes fields for 'Request Owner' (Anita Oliver), 'Amount' (3,000.00), 'Category' (Contract Approval), 'Reference' (FurnitureReviewsPlus), and 'Contact' (Anita Oliver). Below these fields is a table titled 'Approver(s)' with columns for 'Approver', 'Required', and 'Status'. Two approvers are listed: Mitchell Admin and Carol Smith, both with a 'Required' status of 'Yes' and a 'Status' of 'To Approve'. The right section, titled 'Planned Activities', shows a timeline of events. It includes a notification that '8 days overdue: Approval for Carol Smith' is 'To Approve'. Other activities include 'Approval done' by Mitchell Admin on Nov 26, 2024, and 'Approval Status Change' by Mitchell Admin on Nov 25, 2024. A video thumbnail of a person is visible in the bottom right corner of the interface.

Approver	Required	Status
Mitchell Admin	Yes	To Approve
Carol Smith	Yes	To Approve

Approval request details with approvers tab showing required approvers and their statuses

Step 5: Approve the request

Click **Approve** in the top left corner to approve the request on your behalf. Your status changes to "Approved," while any other required approver, such as Carol Smith, remains listed as "To Approve" until they act.

The screenshot displays the Odoo Approvals interface. At the top, navigation tabs include 'Approvals', 'Dashboard', 'My Approvals', 'Manager', and 'Configuration'. The main header shows 'Dashboard / Approvals to review' and 'New Marketing Partnership'. Below this, a status bar contains 'Withdraw', 'Attach Document', and a progress bar with 'To Submit', 'Submitted' (highlighted), 'Approved', and 'Refused'. Action buttons for 'Send message', 'Log note', and 'Activities' are also present.

The 'Approval Subject' section is titled 'New Marketing Partnership'. It lists the 'Request Owner' as Anita Oliver, the 'Amount' as 3,000.00, the 'Category' as 'Contract Approval', and the 'Reference' as 'FurnitureReviewsPlus'. The 'Contact' is also Anita Oliver. There are tabs for 'Description' and 'Approver(s)'. The 'Approver(s)' table shows two approvers: Mitchell Admin (status: Approved) and Carol Smith (status: To Approve).

On the right, the 'Planned Activities' section shows a timeline of events: '8 days overdue: Approval for Carol Smith' (To Approve) on Nov 26, 2024; 'Approval done' on Nov 25, 2024; 'Approval Status Change' (To Submit to Submitted) on Nov 25, 2024; and 'Approval Request created' on Nov 18, 2024. A video feed of a person is visible in the bottom right corner.

Approval request details after one approver has approved, showing updated status

Part 2: Tracking your own requests

Step 6: Open My Requests

To check the status of requests you submitted yourself, select **My Approvals**, then **My Requests** from the navigation menu.

Step 7: Review your requests in List view

By default, your requests appear in Kanban view. Click the **List** icon in the top right corner to switch to List view. Each request shows its status clearly, for example "Submitted" in orange or "Approved" in green. Sample entries include "Borrow Hand Cart" (Category: Borrow Items, Status: Submitted, 12/18/2024 06:00:00 to 14:00:00) and "Client Trip - Los Angeles" (Category: Car Rental Application, Status: Approved, 10/09/2024 12:00:00 to 10/13/2024 12:00:00).

ApprovalsDashboardMy ApprovalsManagerConfiguration

My Requests

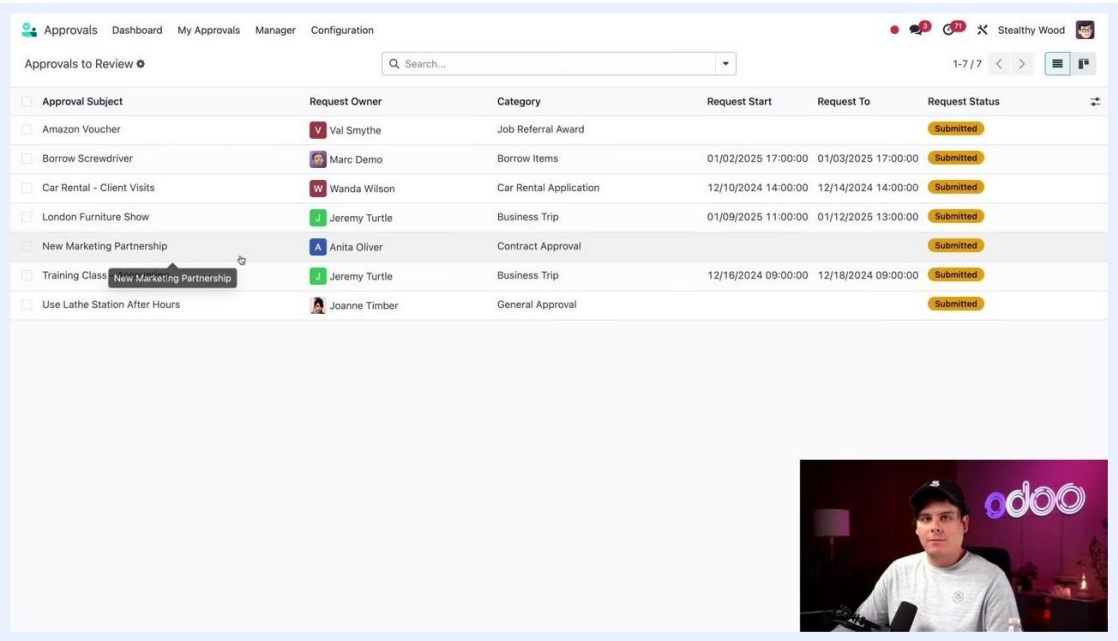
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☐ Approval Subject	Request Owner	Category	Request Start	Request To	Request Status
☐ Borrow Hand Cart	 Mitchell Admin	Borrow Items	12/18/2024 06:00:00	12/18/2024 14:00:00	Submitted
☐ Client Trip - Los Angeles	 Mitchell Admin	Car Rental Application	10/09/2024 12:00:00	10/13/2024 12:00:00	Approved

Odoo Approvals - My Requests in List view showing request subjects, owners, categories, dates, and statuses

Step 8: Review your requests in Kanban view

Switch back to Kanban view to see a visual summary grouped by status: To Submit, Submitted, Approved, Refused, and Canceled. For example, "Borrow Hand Cart" appears under Submitted, while "Client Trip - Los Angeles" appears under Approved. If no action is required on your part, simply wait for further updates.



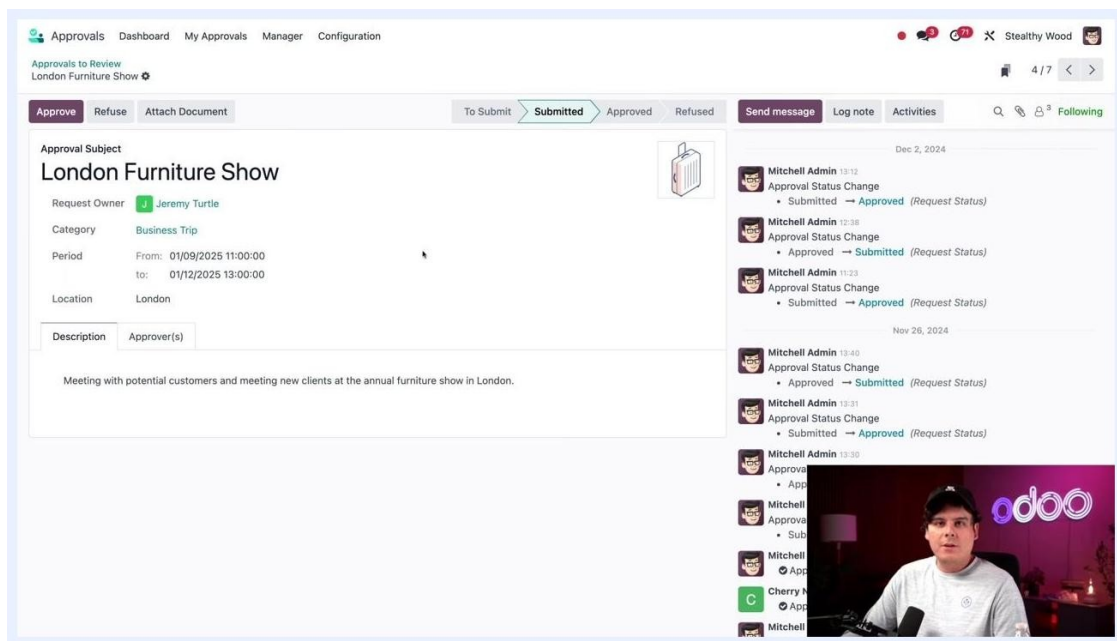
Approval Subject	Request Owner	Category	Request Start	Request To	Request Status
☐ Amazon Voucher	Val Smythe	Job Referral Award			Submitted
☐ Borrow Screwdriver	Marc Demo	Borrow Items	01/02/2025 17:00:00	01/03/2025 17:00:00	Submitted
☐ Car Rental - Client Visits	Wanda Wilson	Car Rental Application	12/10/2024 14:00:00	12/14/2024 14:00:00	Submitted
☐ London Furniture Show	Jeremy Turtle	Business Trip	01/09/2025 11:00:00	01/12/2025 13:00:00	Submitted
☐ New Marketing Partnership	Anita Oliver	Contract Approval			Submitted
☐ Training Class	Jeremy Turtle	Business Trip	12/16/2024 09:00:00	12/18/2024 09:00:00	Submitted
☐ Use Lathe Station After Hours	Joanne Timber	General Approval			Submitted

Odoo Approvals - My Requests in Kanban view grouped by status

Part 3: Manager review of approvals

Step 9: Open Approvals to Review

To see all requests waiting for your approval as a manager, select **Manager** from the top navigation, then click **Approvals to Review**. Each row in the list displays the Approval Subject, Request Owner, Category, Request Start, Request To, and Request Status. All example requests shown are in "Submitted" status, including Amazon Voucher, Borrow Screwdriver, Car Rental - Client Visits, London Furniture Show, New Marketing Partnership, Training Class - Accounting, and Use Lathe Station After Hours.



Approvals to Review list showing all requests awaiting approval with details

Step 10: Review a specific request's details

Select a request to review, for example "London Furniture Show" submitted by Jeremy Turtle. The detail view shows the Approval Subject, Request Owner, Category (Business Trip), Period (01/09/2025 11:00:00 to 01/12/2025 13:00:00), Location (London), and a Description explaining the purpose of the trip. Use the **Description** and **Approver(s)** tabs for more information.

The screenshot displays the 'Approvals to Review' interface for a request titled 'London Furniture Show'. The interface includes a top navigation bar with links to 'Approvals', 'Dashboard', 'My Approvals', 'Manager', and 'Configuration'. The user 'Stealthy Wood' is logged in. The request is currently in the 'Submitted' state, with buttons for 'Approve', 'Refuse', 'Attach Document', 'To Submit', 'Approved', 'Refused', 'Send message', 'Log note', and 'Activities'. The request details are as follows:

- Approval Subject:** London Furniture Show
- Request Owner:** Jeremy Turtle
- Category:** Business Trip
- Period:** From: 01/09/2025 11:00:00 to: 01/12/2025 13:00:00
- Location:** London
- Description:** Meeting with potential customers and meeting new clients at the annual furniture show in London.

The right sidebar shows a list of approval status changes, with the most recent being 'Submitted' to 'Approved' (Request Status) by Mitchell Admin on Dec 2, 2024. A video thumbnail of a person is visible at the bottom right of the sidebar.

Approval request details for London Furniture Show, showing subject, owner, category, period, location, and description

Step 11: Check approval requirements

Open the **Approver(s)** tab to see which approvers are required and their current status. In this example, Jerry Nelson has already approved, and only your approval remains pending.

ApprovalsDashboardMy ApprovalsManagerConfiguration

Stealthy Wood

All Approvals

Search...

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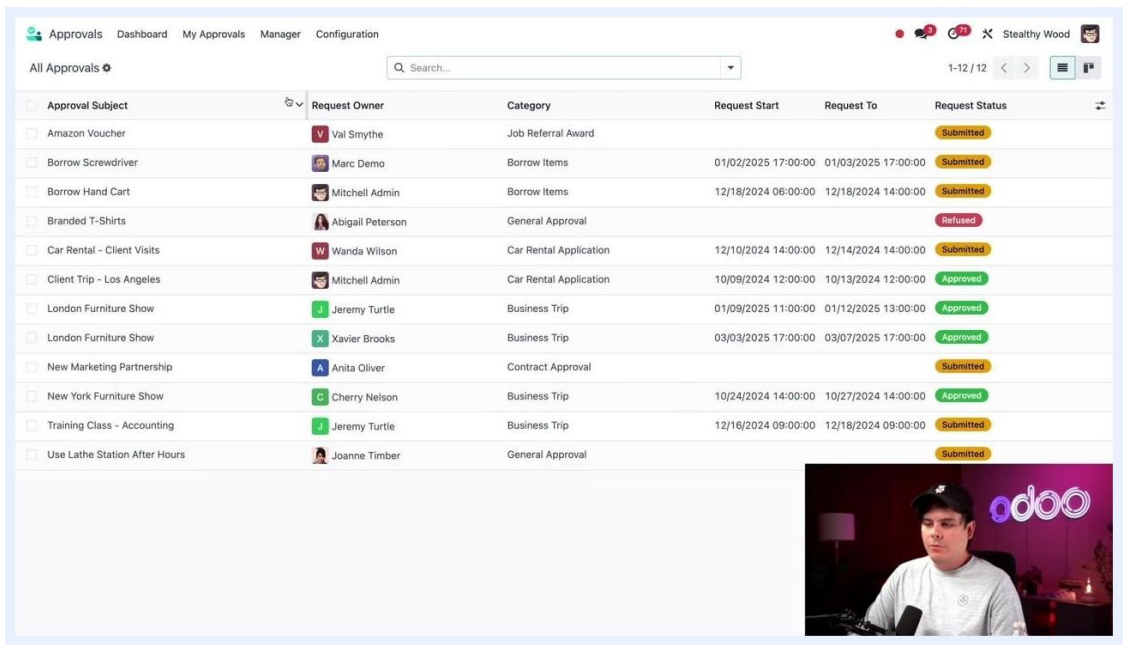
Approval Subject	Request Owner	Category	Request Start	Request To	Request Status
Amazon Voucher	Val Smythe	Job Referral Award			Submitted
Borrow Screwdriver	Marc Demo	Borrow Items	01/02/2025 17:00:00	01/03/2025 17:00:00	Submitted
Borrow Hand Cart	Mitchell Admin	Borrow Items	12/18/2024 06:00:00	12/18/2024 14:00:00	Submitted
Branded T-Shirts	Abigail Peterson	General Approval			Refused
Car Rental - Client Visits	Wanda Wilson	Car Rental Application	12/10/2024 14:00:00	12/14/2024 14:00:00	Submitted
Client Trip - Los Angeles	Mitchell Admin	Car Rental Application	10/09/2024 12:00:00	10/13/2024 12:00:00	Approved
London Furniture Show	Jeremy Turtle	Business Trip	01/09/2025 11:00:00	01/12/2025 13:00:00	Approved
London Furniture Show	Xavier Brooks	Business Trip	03/03/2025 17:00:00	03/07/2025 17:00:00	Approved
New Marketing Partnership	Anita Oliver	Contract Approval			Submitted
New York Furniture Show	Cherry Nelson	Business Trip	10/24/2024 14:00:00	10/27/2024 14:00:00	Approved
Training Class - Accounting	Jeremy Turtle	Business Trip	12/16/2024 09:00:00	12/18/2024 09:00:00	Submitted
Use Lathe Station After Hours	Joanne Timber	General Approval			Submitted



Approval request details with Approver(s) tab showing required approvers and their statuses

Step 12: Approve or withdraw the request

Click **Approve** at the top of the request detail view. Once approved, both required approvers—for example, Mitchell Admin and Cherry Nelson—show as "Approved." If you need to reverse your decision, click **Withdraw**.



Approval Subject	Request Owner	Category	Request Start	Request To	Request Status
☐ Amazon Voucher	Val Smythe	Job Referral Award			Submitted
☐ Borrow Screwdriver	Marc Demo	Borrow Items	01/02/2025 17:00:00	01/03/2025 17:00:00	Submitted
☐ Borrow Hand Cart	Mitchell Admin	Borrow Items	12/18/2024 06:00:00	12/18/2024 14:00:00	Submitted
☐ Branded T-Shirts	Abigail Peterson	General Approval			Refused
☐ Car Rental - Client Visits	Wanda Wilson	Car Rental Application	12/10/2024 14:00:00	12/14/2024 14:00:00	Submitted
☐ Client Trip - Los Angeles	Mitchell Admin	Car Rental Application	10/09/2024 12:00:00	10/13/2024 12:00:00	Approved
☐ London Furniture Show	Jeremy Turtle	Business Trip	01/09/2025 11:00:00	01/12/2025 13:00:00	Approved
☐ London Furniture Show	Xavier Brooks	Business Trip	03/03/2025 17:00:00	03/07/2025 17:00:00	Approved
☐ New Marketing Partnership	Anita Oliver	Contract Approval			Submitted
☐ New York Furniture Show	Cherry Nelson	Business Trip	10/24/2024 14:00:00	10/27/2024 14:00:00	Approved
☐ Training Class - Accounting	Jeremy Turtle	Business Trip	12/16/2024 09:00:00	12/18/2024 09:00:00	Submitted
☐ Use Lathe Station After Hours	Joanne Timber	General Approval			Submitted

Approval request showing both approvers have approved, with option to withdraw

Part 4: Reviewing all approvals and refused requests

Step 13: Open All Approvals

To view every approval request regardless of status, select **Manager**, then **All Approvals** from the navigation menu. Each row shows the Approval Subject, Request Owner, Category, Request Start, Request To, and Request Status, including Submitted, Approved, and Refused statuses. Example entries include "Branded T-Shirts" (Abigail Peterson, General Approval, Refused), "London Furniture Show" (Jeremy Turtle, Business Trip, Approved), "New Marketing Partnership" (Anita Oliver, Contract Approval, Submitted), and "Use Lathe Station After Hours" (Joanne Timber, General Approval, Submitted).

ApprovalsDashboardMy ApprovalsManagerConfiguration

All Approvals

Q Search...

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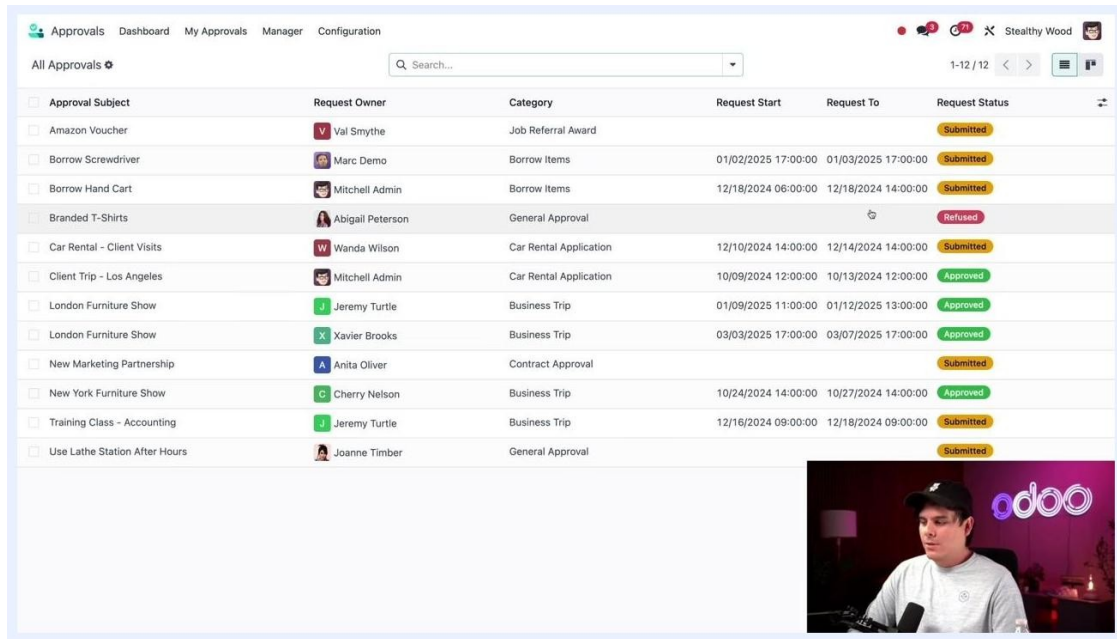
Approval Subject	Request Owner	Category	Request Start	Request To	Request Status
☐ Amazon Voucher	 Val Smythe	Job Referral Award			Submitted
☐ Borrow Screwdriver	 Marc Demo	Borrow Items	01/02/2025 17:00:00	01/03/2025 17:00:00	Submitted
☐ Borrow Hand Cart	 Mitchell Admin	Borrow Items	12/18/2024 06:00:00	12/18/2024 14:00:00	Submitted
☐ Branded T-Shirts	 Abigail Peterson	General Approval			Refused
☐ Car Rental - Client Visits	 Wanda Wilson	Car Rental Application	12/10/2024 14:00:00	12/14/2024 14:00:00	Submitted
☐ Client Trip - Los Angeles	 Mitchell Admin	Car Rental Application	10/09/2024 12:00:00	10/13/2024 12:00:00	Approved
☐ London Furniture Show	 Jeremy Turtle	Business Trip	01/09/2025 11:00:00	01/12/2025 13:00:00	Approved
☐ London Furniture Show	 Xavier Brooks	Business Trip	03/03/2025 17:00:00	03/07/2025 17:00:00	Approved
☐ New Marketing Partnership	 Anita Oliver	Contract Approval			Submitted
☐ New York Furniture Show	 Cherry Nelson	Business Trip	10/24/2024 14:00:00	10/27/2024 14:00:00	Approved
☐ Training Class - Accounting	 Jeremy Turtle	Business Trip	12/16/2024 09:00:00	12/18/2024 09:00:00	Submitted
☐ Use Lathe Station After Hours	 Joanne Timber	General Approval			Submitted



All Approvals list showing all requests with various statuses and details

Step 14: Locate a refused request

Find the request titled "Branded T-Shirts" with Request Owner Abigail Peterson. Its status appears as "Refused," highlighted in red. Other details include Category: General Approval, Request Start: 12/16/2024 14:00:00, and Location: Anytown, NY. Click the row to open the request's details.



Approvals	Dashboard	My Approvals	Manager	Configuration					Stealthy Wood	
All Approvals					Search...		1-12 / 12			
Approval Subject	Request Owner	Category	Request Start	Request To	Request Status					
☐ Amazon Voucher	Val Smythe	Job Referral Award			Submitted					
☐ Borrow Screwdriver	Marc Demo	Borrow Items	01/02/2025 17:00:00	01/03/2025 17:00:00	Submitted					
☐ Borrow Hand Cart	Mitchell Admin	Borrow Items	12/18/2024 06:00:00	12/18/2024 14:00:00	Submitted					
☒ Branded T-Shirts	Abigail Peterson	General Approval			Refused					
☐ Car Rental - Client Visits	Wanda Wilson	Car Rental Application	12/10/2024 14:00:00	12/14/2024 14:00:00	Submitted					
☐ Client Trip - Los Angeles	Mitchell Admin	Car Rental Application	10/09/2024 12:00:00	10/13/2024 12:00:00	Approved					
☐ London Furniture Show	Jeremy Turtle	Business Trip	01/09/2025 11:00:00	01/12/2025 13:00:00	Approved					
☐ London Furniture Show	Xavier Brooks	Business Trip	03/03/2025 17:00:00	03/07/2025 17:00:00	Approved					
☐ New Marketing Partnership	Anita Oliver	Contract Approval			Submitted					
☐ New York Furniture Show	Cherry Nelson	Business Trip	10/24/2024 14:00:00	10/27/2024 14:00:00	Approved					
☐ Training Class - Accounting	Jeremy Turtle	Business Trip	12/16/2024 09:00:00	12/18/2024 09:00:00	Submitted					
☐ Use Lathe Station After Hours	Joanne Timber	General Approval			Submitted					

Odoo Approvals - All Approvals list with 'Branded T-Shirts' by Abigail Peterson highlighted as Refused

Step 15: Review the refused request's details

The detail view shows the Approval Subject (Branded T-Shirts), Request Owner (Abigail Peterson), Amount (678.25), Category (General Approval), Date (12/16/2024 14:00:00), and Location (Anytown, NY). The **Description** tab reads: "I found a sale on custom shirts. I thought these would be great for our annual staff gift." An attached document, shirt.png, shows the Custom Printed T-Shirt Order Form on the right, and the Status tab at the top is highlighted as "Refused."

ApprovalsDashboardMy ApprovalsManagerConfiguration

Search...

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Approval Subject	Request Owner	Category	Request Start	Request To	Request Status
Amazon Voucher	Vai Smythe	Job Referral Award			Submitted
Borrow Screwdriver	Marc Demo	Borrow Items	01/02/2025 17:00:00	01/03/2025 17:00:00	Submitted
Borrow Hand Cart	Mitchell Admin	Borrow Items	12/18/2024 06:00:00	12/18/2024 14:00:00	Submitted
Branded T-Shirts	Abigail Peterson	General Approval			Refused
Car Rental - Client Visits	Wanda Wilson	Car Rental Application	12/10/2024 14:00:00	12/14/2024 14:00:00	Submitted
Client Trip - Los Angeles	Mitchell Admin	Car Rental Application	10/09/2024 12:00:00	10/13/2024 12:00:00	Approved
London Furniture Show	Jeremy Turtle	Business Trip	01/09/2025 11:00:00	01/12/2025 13:00:00	Approved
London Furniture Show	Xavier Brooks	Business Trip	03/03/2025 17:00:00	03/07/2025 17:00:00	Approved
New Marketing Partnership	Anita Oliver	Contract Approval			Submitted
New York Furniture Show	Cherry Nelson	Business Trip	10/24/2024 14:00:00	10/27/2024 14:00:00	Approved
Training Class - Accounting	Jeremy Turtle	Business Trip	12/16/2024 09:00:00	12/18/2024 09:00:00	Submitted
Use Lathe Station After Hours	Joanne Timber	General Approval			Submitted

Approval request details for 'Branded T-Shirts' showing description, refusal status, and attached order form

Step 16: Check the Chatter for the refusal reason

Review the communication history in the Chatter section to understand why the request was refused. In this example, Mitchell Admin left a message on Nov 26, 2024, at 13:33: "Hi @Abigail Peterson - we already picked out our annual employee gift, which are branded fleece jackets. But thanks for your work researching this!" This explains that the company had already decided on a different gift.

Approvals Dashboard My Approvals Manager Configuration					
All Approvals					
Approval Subject	Request Owner	Category	Request Start	Request To	Request Status
☐ Amazon Voucher	Val Smythe	Job Referral Award			Submitted
☐ Borrow Screwdriver	Marc Demo	Borrow Items	01/02/2025 17:00:00	01/03/2025 17:00:00	Submitted
☐ Borrow Hand Cart	Mitchell Admin	Borrow Items	12/18/2024 06:00:00	12/18/2024 14:00:00	Submitted
☐ Branded T-Shirts	Abigail Peterson	General Approval			Refused
☐ Car Rental - Client Visits	Wanda Wilson	Car Rental Application	12/10/2024 14:00:00	12/14/2024 14:00:00	Submitted
☐ Client Trip - Los Angeles	Mitchell Admin	Car Rental Application	10/09/2024 12:00:00	10/13/2024 12:00:00	Approved
☐ London Furniture Show	Jeremy Turtle	Business Trip	01/09/2025 11:00:00	01/12/2025 13:00:00	Approved
☐ London Furniture Show	Xavier Brooks	Business Trip	03/03/2025 17:00:00	03/07/2025 17:00:00	Approved
☐ New Marketing Partnership	Anita Oliver	Contract Approval			Submitted
☐ New York Furniture Show	Cherry Nelson	Business Trip	10/24/2024 14:00:00	10/27/2024 14:00:00	Approved
☐ Training Class - Accounting	Jeremy Turtle	Business Trip	12/16/2024 09:00:00	12/18/2024 09:00:00	Submitted
☐ Use Lathe Station After Hours	Joanne Timber	General Approval			Submitted

Approval request details with Chatter showing refusal reason and communication

All communications and decisions are recorded in the Chatter section, so you can always return to a request to review its decision history and comments. This keeps the approval workflow transparent and accountable.

The screenshot displays the Odoo Approvals app interface. The top navigation bar includes 'Approvals', 'Dashboard', 'My Approvals', 'Manager', and 'Configuration'. The main header shows 'All Approvals' and 'Branded T-Shirts'. The request is currently in the 'Refused' state, with tabs for 'Withdraw', 'Attach Document', 'To Submit', 'Submitted', 'Approved', and 'Refused'. The request details panel shows the 'Approval Subject' as 'Branded T-Shirts', the 'Request Owner' as 'Abigail Peterson', the 'Category' as 'General Approval', the 'Date' as '12/16/2024 14:00:00', the 'Period' as 'From: to:', the 'Location' as 'Anytown, NY', and the 'Contact' as 'Abigail Peterson'. The 'Amount' is '678.25' and the 'Reference' is visible. The 'Description' tab is active, showing the text: 'I found a sale on custom shirts. I thought these would be great for our annual staff gift.' The 'Chatter' section shows a message from 'Mitchell Admin' dated 'Nov 26, 2024' stating: 'Hi @Abigail Peterson - we already picked out our annual employee gift, which are branded fleece jackets. But thanks for your work researching this!'. The document viewer on the right shows a 'Custom Printed T-Shirt Order Form' with a table for 'Color', 'S', 'M', 'L', 'XL', 'XXL', 'TOTALS', 'PRICE', and 'EXT'. The form also includes sections for 'Screen Costs', 'Total', 'Front', 'Back', 'INK Color 1', 'INK Color 2', 'INK Color 3', 'NAME', 'ADDRESS', 'CITY, STATE, ZIP', 'PHONE', 'FAX', 'CONTACT', 'SALARY/PAID', 'ORDER DATE', 'SHIP DATE', and 'BAS'. A small video inset in the bottom right corner shows a person wearing a cap and a microphone, with the Odoo logo in the background.

Approval request details with Chatter and description tab visible, showing full decision history

What's next

By following these steps, you can efficiently manage your own requests, review and approve requests awaiting your action, and monitor all approval activity within the Odoo Approvals app. This workflow ensures transparency and accountability for every business process that requires approval.