Training guide
Odoo 19

Purchase in Odoo

Procurement from zero to one hundred: the business, the app, every setting and scenario, the links to stock and accounting, and how to implement it.

1. **Need** a request, a reordering rule, a sales order
2. **Source** request for quotation, tender, agreement
3. **Order** approval and purchase order
4. **Receive** goods into stock, with quality checks
5. **Bill** the vendor's invoice, matched three ways
6. **Pay and analyse** payment, vendor performance, spend

For implementation consultants: what purchasing is, how Odoo models it, and how five world-class buyers would be set up.

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The short version

Purchasing is how a company turns a need into goods on the shelf and a debt in the books. Odoo's Purchase app is the document in the middle, the purchase order, and its links to everything before and after it.

Question	Answer in one sentence
What does the app do?	It manages requests for quotation, purchase orders and long-term agreements with vendors, and follows each order until it is received and billed.
What does it not do alone?	Receiving belongs to Inventory, the vendor's invoice and the payment to Accounting. Purchase creates and tracks those documents; the other apps process them.
Where does a purchase start?	From a buyer typing an order, or automatically: a reordering rule, a sales order that needs goods, a manufacturing order that needs components.
How does Odoo know the price?	From the vendor pricelist on the product: vendor, price, minimum quantity, validity and lead time.
How is control exercised?	Approval above an amount, locking of confirmed orders, the bill control policy, three-way matching, and user roles.
What decides the success of an implementation?	Clean vendor and product data, a small number of well-chosen settings, and agreement on who does which step.

How to read this guide

Parts A and B explain the business and the app. Part C applies them to real kinds of companies, including five of the world's best-known buyers. Part D is for the day you implement it. Sections are marked Functional for what users and consultants do on the screen and Technical for what happens underneath. Features that need the Enterprise edition are marked Enterprise.

What is in this guide

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Scope: Odoo 19, Community and Enterprise. Menu names and settings follow that version. The running example is the invented company of this series, Sahand Industrial Co., which makes electrical panels and buys components from Pars Electric Co.; all names and figures are made up, and amounts are in million rial. The five large companies in section 15 are described from what is publicly known about how they buy; the Odoo set-ups shown for them are teaching models, not descriptions of the systems those companies use.

Part A The business of purchasing

1 What purchasing is

Functional

Before any screen: purchasing is a chain of six steps, done by different people, each leaving a document. An ERP exists to keep those documents consistent with each other.

The procure-to-pay cycle

1 Need	2 Source	3 Order	4 Receive	5 Bill	6 Pay
Requester, planner	Buyer	Buyer, approver	Storekeeper, quality	Accountant	Treasurer
Someone, or a rule, establishes that something must be bought.	Vendors are asked for prices and terms; one is chosen.	A binding order is approved and sent to the vendor.	The goods arrive, are counted and checked.	The vendor's invoice is recorded and checked against order and receipt.	The debt is paid on its due date.
`purchase request`	`request for quotation`	`purchase order`	`receipt`	`vendor bill`	`payment`

Every purchasing department in the world runs some version of this chain. Companies differ in how formal each step is, how much is automated, and who is allowed to do what. Those differences are exactly what you configure.

Why companies care about it

Cost
For a trading or manufacturing company, purchases are the largest share of all spending. One percent saved on buying is worth far more than one percent more sales.

Continuity
A missing component stops a production line; a missing product loses a sale. Purchasing decides what is on the shelf and when.

Control
Money leaves the company through purchases. Without rules, orders are placed that nobody approved and invoices are paid for goods that never came.

The people and what each one needs from the system

Role	Does	Needs to see
Requester	Asks for something: a department, a project manager, a production planner.	Whether the request was ordered, and when it arrives.
Buyer	Chooses the vendor, negotiates, creates and follows the order.	Prices, lead times, past orders, what is late.
Approver	Authorises orders above a limit: purchasing manager, finance manager, a committee.	The order, the alternatives considered, the budget.
Storekeeper	Receives, counts and stores the goods.	What is expected today, from whom, in what quantity.
Quality controller	Accepts or rejects what arrived.	The specification and the checks to perform.
Accounts payable	Records the vendor's invoice and checks it.	The order, the quantities received, the agreed price.
Treasurer	Pays.	What is due, to whom, and whether it is cleared for payment.

The control every auditor looks for

Three-way match

An invoice is paid only if three documents agree: the **order** (what we agreed to buy, at what price), the **receipt** (what actually arrived) and the **bill** (what the vendor charges). A price above the order, or a quantity above the receipt, stops the payment.

Segregation of duties

The person who orders should not be the one who receives, and neither should be the one who pays. If one person can do all three, they can order from a friend, confirm a delivery that never happened and pay for it. Roles in the system make the separation real.

Two families of purchase

	Direct purchases	Indirect purchases
What	Goods that go into what the company sells: raw materials, components, goods for resale.	Everything else: office supplies, services, maintenance, travel, software.
Driven by	Stock levels, sales, production plans. Largely automatic.	Requests from people. Largely manual.
Typical control	Agreed prices, reordering rules, quality checks.	Budgets and approval by amount.
In Odoo	Storable products, vendor pricelists, replenishment.	Service or consumable products, analytic distribution, approval.

2 The vocabulary

Purchasing has its own words. These are the ones used in the rest of the guide, with the Persian term a customer in Iran is likely to use.

Term	Persian	Meaning
Vendor, supplier	تأمین‌کننده، فروشنده	The company you buy from. Odoo says vendor.
Purchase request	درخواست خرید	An internal request to the purchasing department. Not a standard Odoo document; see section 17.
Request for quotation (RFQ)	استعلام بها	A question to a vendor: at what price and when can you supply this? In Odoo it is also the draft of a purchase order.
Quotation, proforma	پیش‌فاکتور	The vendor's answer.
Call for tenders	مناقصه، استعلام چندگانه	Asking several vendors for the same thing and comparing the answers.
Purchase order (PO)	سفارش خرید	The confirmed, binding order.
Blanket order	قرارداد خرید بلندمدت	A long-term agreement on price and total quantity, delivered in several orders over time.
Receipt	رسید انبار	The document recording that goods arrived. Sometimes called goods received note.
Backorder	باقی‌مانده سفارش	The part of an order still to come after a partial delivery.

Term	Persian	Meaning
Vendor bill	فاکتور خرید، صورتحساب خرید	The vendor's invoice, as recorded in our books.
Three-way match	تطبیق سه‌گانه	Checking order, receipt and bill against each other before paying.
Lead time	زمان تحویل	The number of days between ordering and receiving.
Minimum order quantity	حداقل مقدار سفارش	The smallest quantity a vendor will sell at a given price.
Reordering point	نقطه سفارش	The stock level below which a new order is triggered.
Make to stock, make to order	تأمین برای انبار، تأمین بر اساس سفارش	Buying to keep a stock level, or buying only when a customer order needs it.
Dropshipping	ارسال مستقیم	The vendor delivers straight to our customer; the goods never enter our warehouse.
Subcontracting	برون‌سپاری تولید	A vendor manufactures for us, often with components we supply.
Landed cost	هزینه‌های حمل و ترخیص	Freight, insurance, customs and handling, added to the cost of the goods.
Incoterm	شرایط تحویل (اینکوترمز)	The standard term that says where the vendor's responsibility ends: EXW, FOB, CIF, DAP.
Payment terms	شرایط پرداخت	When the bill is due: 30 days, 30% in advance, and so on.
Purchase return	برگشت از خرید	Sending goods back to the vendor, with a credit note for their value.

Part B The Purchase app

3 The app at a glance

The Purchase app is small: four menus and a handful of objects. Its weight comes from what it triggers in Inventory and Accounting.

The menus Functional

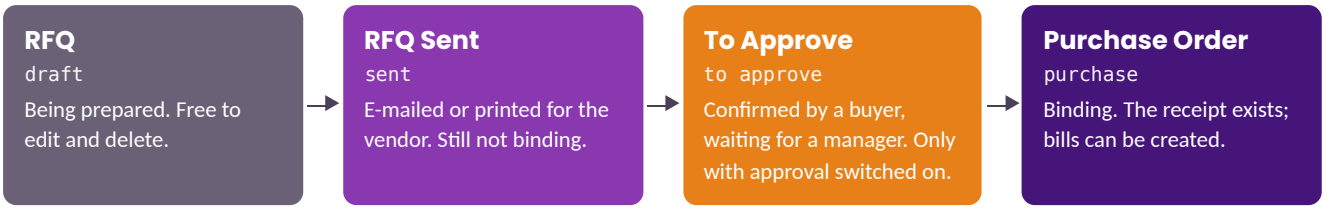
Menu	Entries	Used for
Orders	Requests for Quotation, Purchase Orders, Purchase Agreements, Vendors	The daily work of buyers. Purchase Agreements appears once the setting is on.
Products	Products, Product Variants	The same products as in Sales and Inventory, opened with purchasing in mind.
Reporting	Purchase	The purchase analysis: spend, quantities, delays.
Configuration	Settings, Vendor Pricelists, product categories, units	Set-up, and bulk import of vendor prices.

The list of requests for quotation opens with a small dashboard: how many are still **To Send**, how many are **Waiting** for the vendor's answer and how many are **Late**, for all buyers and for the current user.

The objects

Object	Model Technical	What it is
RFQ and purchase order	`purchase.order`	One document with a status. A request for quotation and a purchase order are the same record at two moments of its life.
Order line	`purchase.order.line`	One product, quantity, price, taxes and expected date. It remembers how much was received and billed.
Vendor	`res.partner`	An ordinary contact. Anyone can be bought from.
Vendor pricelist line	`product.supplierinfo`	"This vendor sells this product at this price, from this quantity, in this many days."
Purchase agreement	`purchase.requisition`	A blanket order or a purchase template.
Receipt	`stock.picking`	The incoming transfer, in Inventory.
Vendor bill	`account.move`	The vendor's invoice, in Accounting.
Reordering rule	`stock.warehouse.orderpoint`	"Keep between this minimum and this maximum", in Inventory.

The life of an order



A fifth status, Cancelled (`cancel`), can be reached from any of them. In Odoo 19 "Locked" is a flag on a purchase order, not a status of its own.

Button	Moves the order	And also
Send by Email, Print RFQ	RFQ → RFQ Sent	Opens the e-mail with the RFQ attached, or the PDF.
Confirm Order	RFQ or RFQ Sent → Purchase Order, or → To Approve	Creates the receipt. Records the confirmation date. Adds the vendor to the product if it was missing.
Approve Order	To Approve → Purchase Order	Purchase administrators only.
Lock, Unlock	Sets or clears the locked flag	A locked order cannot be edited or cancelled.
Cancel	→ Cancelled	Refused if the order is locked or has a bill that is not cancelled. Cancels the receipt.
Set to Draft	Cancelled → RFQ	

A confirmed order carries two more indicators that move independently: the **receipt status** (nothing, partially, fully received) and the **billing status** (Nothing to Bill, Waiting Bills, Fully Billed). An order is truly finished when it is fully received *and* fully billed.

4 Master data: vendors, products, prices

Purchasing runs on three kinds of record. When an order comes out wrong, the cause is nearly always in one of them, not in the order.

The vendor Functional

A vendor is a contact. What matters for purchasing is on two tabs of the contact form.

Field	Tab	What it drives
Payment Terms (vendor)	Sales & Purchase	Copied to every order and bill; decides the due date.
Supplier Currency	Sales & Purchase	The currency of new orders for this vendor.
Buyer	Sales & Purchase	The user proposed as responsible on new orders.
Receipt Reminder	Sales & Purchase	Sends the vendor an e-mail some days before the expected arrival, asking to confirm the date.
Fiscal Position	Sales & Purchase	Swaps taxes for special vendors: foreign, exempt.
Account Payable	Accounting	The account credited by this vendor's bills.
Bank accounts	Accounting	Needed to pay by transfer.
Tax ID	Header	Printed on documents; needed for tax reporting.
On-time Delivery Rate	Sales & Purchase	Computed: the share of this vendor's quantities received on or before the expected date.
Warning on purchase orders	Internal notes	A message shown, or a block, whenever this vendor is used. Needs the Warnings setting.

The product, seen by a buyer Functional

Field	Where	What it drives
Purchase (tick box)	Top of the form	Whether the product can be chosen on an order at all.
Product Type, Track Inventory	General Information	Goods that are tracked create receipts and stock. Services and untracked goods are received by typing a quantity on the order.
Vendors	Purchase tab	The vendor pricelist lines of this product. See below.
Vendor Taxes	Purchase tab	The taxes proposed on order and bill lines.
Control Policy	Purchase tab	Bill what was *ordered*, or what was *received*. Section 9.
Purchase Description	Purchase tab	Text added to the line on documents sent to the vendor.
Routes	Inventory tab	Buy, Replenish on Order, Dropship: how a need for this product is satisfied. Section 8.
Cost	General Information	The fallback price when no vendor line matches.
Product Category	General Information	The expense account and the costing method.

The vendor pricelist: where prices and lead times come from

Each line on the Purchase tab of a product is one offer from one vendor. Odoo reads these lines every time the product is put on an order, by a person or by a rule.

Field	Technical Technical	Meaning
Vendor	`partner_id`	Who offers.
Product Variant	`product_id`	Empty for all variants, or one specific size or colour.
Vendor Product Name, Code	`product_name`, `product_code`	What the vendor calls it. Printed on the RFQ so that the vendor recognises the item.
Quantity	`min_qty`	From how many units this price applies.
Unit Price, Discount	`price`, `discount`	The agreed price, and a percentage off it.
Currency	`currency_id`	The currency of that price.
Validity	`date_start`, `date_end`	The period in which the price holds.
Delivery Lead Time	`delay`	Days from confirmation to receipt. Sets the expected arrival and when to order.
Order in the list	`sequence`	The first vendor in the list is the default for automatic orders.

Example: the circuit breaker CB-63 at Sahand.

#	Vendor	From quantity	Unit price	Lead time	Validity
1	Pars Electric Co.	1	0.80	7 days	Year 1405
2	Pars Electric Co.	500	0.74	7 days	Year 1405
3	Tavan Kala Co.	1	0.86	2 days	Open

Order	What Odoo fills in
A buyer orders 100 from Pars Electric.	Price 0.80, arrival in 7 days.
A buyer orders 600 from Pars Electric.	Price 0.74: the line with the highest minimum quantity that the order reaches.
A buyer orders 100 from Tavan Kala.	Price 0.86, arrival in 2 days.
A reordering rule needs 100, with no vendor set on the rule.	An RFQ for Pars Electric, the first vendor in the list.
A buyer orders from a vendor with no line.	The product's Cost as price, arrival today. On confirmation the vendor is added to the list.

> **The rule of thumb for data**
> Every product that is bought regularly needs at least one vendor line with a real price and a real lead time. Without the price, buyers type prices and reports of price variance mean nothing. Without the lead time, every automatic order is dated today and arrives "late".

5 Every setting

The settings of the Purchase app fit on one screen. Each one changes behaviour for the whole company, so each deserves a decision, not a guess.

Purchase › Configuration › Settings

Setting	What it does	Switch it on when	Behind it Technical
Orders			
Purchase Order Approval	Orders whose total reaches the Minimum Amount stop at "To Approve" when a buyer confirms them. A purchase administrator approves.	Someone other than the buyer must authorise large orders.	`po_double_validation`, `po_double_validation_amount` on the company
Lock Confirmed Orders	An order is locked the moment it is confirmed: no more changes to lines, prices or quantities.	The order sent to the vendor must stay as it was sent.	`po_lock` on the company; `locked` on the order
Warnings	Lets you put a message, or a block, on a vendor or a product, shown when it is used on an order.	Some vendors or products need care: "prepayment only", "being phased out".	Group `group_warning_purchase`
Purchase Agreements	Adds blanket orders, purchase templates, and alternative RFQs for comparing vendors.	You have long-term contracts, or must compare several quotations.	Module `purchase_requisition`
Receipt Reminder	E-mails vendors a few days before the expected arrival and lets them confirm the date.	Late deliveries are a problem and vendors read e-mail.	Group `group_send_reminder`
Invoicing			
Bill Control	The default for new products: bill *ordered* quantities or *received* quantities.	Always decide. "Received" is the safer default for goods.	`purchase_method` on the product
3-way matching Enterprise	Adds a "Should Be Paid" indicator on each bill: Yes, No or Exception, from comparing order, receipt and bill.	Accounts payable must not pay what was not received.	Module `account_3way_match`
Products			
Variant Grid Entry	Orders a product with variants through a grid: sizes across, colours down, a quantity in each cell.	You buy clothing, shoes, anything with two attributes.	Module `purchase_product_matrix`
Units of Measure & Packagings	Lets a product be bought in one unit and stocked in another: boxes of 12, pallets, kilograms.	The vendor's selling unit differs from your stock unit.	`uom.uom`
Logistics			
Dropshipping	Adds the Dropship route: the vendor delivers to your customer.	You sell goods you never handle.	Module `stock_dropshipping`

Settings in other apps that change purchasing

App	Setting	Effect on purchasing
Inventory	Multi-Step Routes	Receipts in one, two or three steps: straight to stock, through an input area, through quality control.
	Storage Locations	"Deliver To" on the order, and putting goods away to shelves.
	Lots & Serial Numbers	The receipt asks for the lot or serial number of what arrives.
	Landed Costs	Freight and customs can be added to the cost of received goods.
	Days to Purchase, Replenishment Horizon	How many days the purchasing department needs to place an order, and how far ahead needs are looked at.
	Quality Enterprise	Checks that must be passed on receipt.
Accounting	Default purchase tax	Given to every new product.
	Currencies	Orders in the vendor's currency.
	Analytic Accounting	A project or cost centre on each order line, carried to the bill.
	Inventory valuation	Whether a vendor bill for goods is booked as an expense or as stock. Section 9.
	Bill digitisation Enterprise	A scanned vendor invoice is read and matched to its purchase order.
Manufacturing	Subcontracting	Purchase orders to a subcontractor that receive a manufactured product.
Sales	(Replenish on Order route)	A confirmed sales order can create the purchase order for what it sold.

A sound starting point

For most first implementations: approval on, with an amount agreed with the finance manager; lock off during the first months, on once people are disciplined; bill control on received quantities; purchase agreements on only if contracts or comparisons really exist; receipts in one step unless a quality stage exists in real life.

What approval does and does not do

It is one level, by total amount, and the approver is anyone with the Purchase administrator role. It does not route by department, by product category or to a named person, and it has no second and third level. Companies that need that use the Approvals app, Studio approval rules Enterprise, or a development (section 17).

6 The standard flow, step by step

One complete purchase, with what the user does and what Odoo does at each step. Every other scenario in this guide is a variation of it.

Sahand needs 100 circuit breakers CB-63. The buyer orders them from Pars Electric Co. at 0.80 each, plus 10% VAT. Bill control is on received quantities; approval is required from 500 upwards.

1 Create the request for quotation

Purchase › Orders › Requests for Quotation › New. Choose the vendor, add the product and the quantity.

> **Odoo does** From the vendor: currency, payment terms, fiscal position, buyer. From the vendor pricelist: price 0.80, the vendor's product code, expected arrival in 7 days. From the product: taxes and description. The document is numbered P00012 and is in status RFQ.

2 Send it to the vendor

Send by Email opens a message with the RFQ attached as PDF; Print RFQ gives the PDF alone.

> **Odoo does** Status RFQ Sent. The e-mail and any reply are kept in the chatter of the order. If the vendor answers with another price or date, the buyer edits the lines.

3 Confirm the order

Confirm Order. The total is 88, below the approval limit, so no approval is needed.

> **Odoo does** Status Purchase Order; the Order Deadline field becomes the Confirmation Date. A receipt, WH/IN/00009, is created in Inventory for 100 units, expected in 7 days, and a Receipt button appears on the order. Billing status: Nothing to Bill, because nothing was received yet.

4 Receive the goods

The storekeeper opens the receipt, from the order or from Inventory › Receipts, checks the quantity and presses Validate. If only 60 arrived, he enters 60, and Odoo offers to create a backorder for the other 40.

> **Odoo does** Stock on hand rises by what was received. The order line shows Received: 100. Billing status becomes Waiting Bills. The vendor's on-time rate is updated from the dates.

5 Record the vendor's invoice

On the order, Create Bill. A draft vendor bill opens with the received quantity at the ordered price. The accountant types the vendor's own invoice number in Bill Reference and its date in Bill Date, compares the totals with the paper, and presses Confirm.

> **Odoo does** The bill is posted as BILL/2026/10/00001 for 88 and the accounting entry is written. The order line shows Billed: 100; billing status Fully Billed. The amount appears in the vendor's payable, due according to the payment terms.

6 Pay

On the bill, Pay; choose the bank journal and the date. Later the bank statement line is matched with the payment.

> **Odoo does** The bill becomes In Payment, then Paid. The vendor's balance returns to zero.

The same order, seen through its three indicators

After step	Status	Received	Billed	Billing status
1 Created	RFQ	0	0	Nothing to Bill
2 Sent	RFQ Sent	0	0	Nothing to Bill
3 Confirmed	**Purchase Order**	0	0	Nothing to Bill
4 Received	Purchase Order	**100**	0	**Waiting Bills**
5 Billed	Purchase Order	100	**100**	**Fully Billed**
6 Paid	Purchase Order	100	100	Fully Billed

Payment is not visible on the purchase order: it is a fact about the bill. To know whether an order is paid, open its bill from the smart button.

What was written where Technical

Step	Table	Rows
1	`purchase_order`, `purchase_order_line`	One order in state `draft`, one line.
2	`mail_message`	The e-mail, in the chatter. The order's state becomes `sent`.
3	`stock_picking`, `stock_move`	One receipt, one move linked to the order line through `purchase_line_id`. State `purchase`.
4	`stock_move_line`, `stock_quant`	The detailed movement; the quantity on hand in the stock location. `qty_received` on the order line is recomputed.
5	`account_move`, `account_move_line`	The bill, with invoice lines linked to the order line through `purchase_line_id`. `qty_invoiced` is recomputed.
6	`account_payment`, reconciliation	The payment, matched with the bill's payable line.

7 Twenty scenarios

Real purchasing is the standard flow with one thing changed. Each card gives the business case, what to set up, what happens, and the point where implementations usually slip.

1 Buying a service

Case Transport, maintenance, consulting, rent. Nothing enters the warehouse.

Set up Product of type Service, with an expense account on its category. Control policy on ordered quantities for a fixed fee, on received quantities for work paid as it is done.

Flow Order → confirm → no receipt is created. With "received quantities", someone types the Received quantity on the order line when the work is done; then Create Bill.

Watch Nobody owns the Received column. Decide who confirms that a service was delivered.

2 Receipt in one, two or three steps

Case Goods pass through an unloading area, or must be inspected before they are stored.

Set up Inventory setting Multi-Step Routes; on the warehouse, Incoming Shipments: receive and store (1), receive then store (2), receive, quality control, then store (3).

Flow The purchase order is identical. Only the number of transfers after the receipt changes: an internal transfer to stock, or one to quality control and one to stock.

Watch Each step is a document someone must validate. Three steps without three real stages only creates backlog.

3 Partial receipt and backorder

Case The vendor delivers 60 of the 100 ordered, the rest next week.

Set up Nothing. On the operation type, Create Backorder can be set to Ask, Always or Never.

Flow Enter 60 on the receipt and validate. Create Backorder keeps a second receipt for 40 open; No Backorder closes the order at 60. The order line shows Received 60, and only 60 can be billed.

Watch Storekeepers pressing No Backorder out of habit. The remaining 40 disappear from every planning screen.

4 Return to the vendor and refund

Case Five units are defective, or the vendor delivered too many.

Set up Nothing.

Flow On the validated receipt, Return, choose the quantity, validate the return transfer. Received on the order drops to 95. If the bill was already posted for 100, create a credit note from the bill for 5; if not, the bill is created for 95.

Watch Returning goods by a manual stock adjustment. The order then still says 100 received and the vendor is paid in full.

5 Bill before receipt, and prepayment

Case The vendor invoices on order, or wants 30% in advance.

Set up For "invoice on order": control policy on ordered quantities. For an advance: nothing.

Flow Ordered-quantity products can be billed as soon as the order is confirmed. An advance is registered as a vendor payment without a bill; it waits as an outstanding amount and is matched with the bill when that arrives. Recent versions can also attach a bill line to an order as a down payment.

Watch Advances booked as expenses. Agree with finance on a prepayments account and how it is cleared.

6 An order that needs approval

Case Orders of 500 or more must be authorised by the purchasing manager.

Set up Purchase Order Approval with Minimum Amount 500.

Flow The buyer presses Confirm Order; the order stops at To Approve and no receipt exists yet. An administrator opens it and presses Approve Order. An order confirmed by an administrator never stops.

Watch Giving every buyer the Administrator role "so that settings work". Approval then does nothing. Splitting an order into two below the limit also passes.

7 Blanket order

Case A one-year contract: 12,000 CB-63 at 0.72, called off month by month.

Set up Purchase Agreements setting. Orders › Purchase Agreements › New, type Blanket Order, vendor, validity dates, products with quantity and price; Confirm.

Flow Confirming adds the agreed price to the product's vendor pricelist. Each call-off is an ordinary RFQ, created from the agreement (New Quotation) or linked through the Blanket Order field. The agreement shows the quantity ordered so far.

Watch Nothing blocks ordering more than the agreed quantity, or after the end date. If the contract has a hard ceiling, that is a development.

8 Comparing quotations

Case Three vendors must quote before an order is placed: a call for tenders, استعلام بها.

Set up Purchase Agreements setting.

Flow Create the first RFQ. On its Alternatives tab, Create Alternative for each other vendor, with Copy Products. Send all. Enter the answers. Compare Product Lines lists every line of every vendor side by side; Choose the best ones, lines not chosen go to zero. Confirm; Odoo offers Cancel Alternatives or Keep Alternatives.

Watch It compares price and date only. Scoring on quality or terms, and a signed comparison sheet, are not there.

9 Purchase template

Case The same basket is ordered every month: cleaning supplies, a standard kit.

Set up A purchase agreement of type Purchase Template, with vendor and lines.

Flow New Quotation from the template copies vendor, lines, quantities and prices into an RFQ that can be edited before confirmation.

Watch A template is only a copy source. Unlike a blanket order it does not write prices to the vendor pricelist and tracks no total.

10 Automatic replenishment

Case Stock items must never run out; nobody should have to remember them.

Set up Route Buy and a vendor line on the product. A reordering rule: minimum 200, maximum 1,000, trigger Auto.

Flow When forecasted stock falls below 200, the scheduler creates or completes a draft RFQ for the vendor, for the quantity that brings stock back to 1,000. A buyer reviews and confirms.

Watch Rules loaded with guessed minimums. Start with the 50 items that matter and review after a month. Section 8.

11 Buying to order, from a sale

Case A special item is bought only when a customer orders it.

Set up Routes Buy and Replenish on Order (MTO) on the product. The MTO route is archived by default and must be restored first.

Flow Confirming the sales order creates an RFQ for exactly the sold quantity. The order's Source field shows the sales order; the receipt is reserved for that delivery.

Watch MTO ignores free stock. For "buy only if we have none", a reordering rule with minimum 0 and maximum 0 is the better tool.

12 Dropshipping

Case The vendor delivers straight to the customer. The goods never touch your warehouse.

Set up Dropshipping setting; route Dropship on the product, or chosen on the sales order line; a vendor line.

Flow Sales order confirmed → RFQ to the vendor with the customer's address as delivery address → on confirmation a Dropship transfer from vendor to customer replaces receipt and delivery. Validating it updates received and delivered quantities at once.

Watch Someone must validate the dropship transfer when the vendor ships, or neither bill nor invoice can follow.

13 Subcontracting

Case An outside workshop makes or finishes a product, sometimes with components you supply.

Set up Manufacturing setting Subcontracting; a bill of materials of type Subcontracting naming the subcontractor; the subcontractor as vendor of the finished product, priced for the work.

Flow A purchase order for the finished product. Components are sent to the subcontractor if the route says so. Receiving the product consumes the components and records the production. The bill is for the work.

Watch Component stock at the subcontractor is your stock and must be counted.

14 A vendor in a foreign currency

Case A supplier in the UAE invoices in dirham.

Set up Activate the currency and keep its rates; set Supplier Currency on the vendor; prices in that currency on the vendor line.

Flow Order and bill are in dirham. The bill is converted at the rate of its date. Paying at another rate posts the gain or loss to the exchange difference accounts automatically.

Watch Rates not updated. Where the official and the real rate differ, as in Iran, decide which rate table the company keeps.

15 Import with landed costs

Case Freight, insurance, customs duty and clearance must be part of the cost of the goods.

Set up Inventory setting Landed Costs; service products marked "Is a Landed Cost"; costing method average or FIFO on the goods' category.

Flow Receive the goods. Record the freight and customs bills, then create a landed cost that points to the receipt and splits the amount by quantity, value, weight or volume. The unit cost of the goods rises accordingly.

Watch Costs that arrive months later, after the goods are sold. The import file as a whole is a frequent development (section 17).

16 Buying for a project or cost centre

Case Management wants spend per project, department or contract.

Set up Analytic Accounting in Accounting. Optionally distribution models that fill it in from product or vendor.

Flow Set the Analytic Distribution on each order line. It is copied to the bill line, and the analytic items are created when the bill is posted.

Watch The analytic account is not mandatory by default. If it must never be missing, make it required through the analytic plan's applicability.

17 Units and packagings

Case Cable is bought by the 500 m drum and stocked by the metre; screws come in boxes of 100.

Set up The Units & Packagings setting; the unit or packaging on the vendor line and on the order line.

Flow The order says 4 drums at the drum price. The receipt adds 2,000 m to stock. The bill follows the order's unit.

Watch A wrong conversion factor corrupts stock and cost quietly. Test every unit with one real order before go-live.

18 Variants in a grid

Case A garment in 6 sizes and 5 colours: thirty lines to type.

Set up Variants in Inventory or Sales settings; Variant Grid Entry in Purchase.

Flow Choosing the product template on a line opens a grid; quantities typed in the cells become one order line per variant.

Watch Prices per variant need vendor lines per variant.

19 Buying from a sister company

Enterprise

Case Two companies of one group in the same database trade with each other.

Set up Settings › Companies, Inter-Company Transactions: synchronise orders, bills, or both.

Flow Confirming a purchase order in company A creates the matching sales order in company B. B's customer invoice creates A's vendor bill.

Watch Products, taxes and units must be shared and consistent in both companies.

20 Consignment stock

Case A vendor's goods sit in your warehouse and stay the vendor's until used or sold.

Set up Inventory setting Consignment.

Flow A receipt without a purchase order, with the vendor as Owner (Assign Owner). The stock is visible and usable but not valued as yours. What is consumed is reported to the vendor and then bought.

Watch The periodic "report consumption and create the order" step is manual in standard Odoo.

8 Purchase and Inventory

In one direction Purchase feeds Inventory with receipts. In the other, Inventory feeds Purchase with needs. The second direction is where most of the value of an ERP lies.

From order to stock

Confirming an order creates its receipt. The receipt is an Inventory document: the buyer cannot "receive" from the order unless he also has Inventory rights. Quantities come back to the order line automatically.

On the order	Effect in Inventory
Deliver To	The operation type, and so the warehouse, that receives. Chooses Dropship when the goods go to a customer.
Expected Arrival	The scheduled date of the receipt. Drives "late" on both sides.
Quantity increased after confirmation	The open receipt is increased.
Quantity decreased after confirmation	The receipt is reduced if possible; otherwise a warning is logged on the receipt for the storekeeper.
Order cancelled	Open receipts are cancelled. Not possible once something was received and billed.
Incoterm	Printed on documents; informative. It does not change entries.

From need to order: how Odoo decides to buy

A need appears → Stock falls below a minimum, a sales order is confirmed, a manufacturing order needs a component.

Route → The product's route says how to satisfy it. Buy means: from a vendor.

Vendor → The vendor set on the rule, else the first matching line of the vendor pricelist.

Draft RFQ → Added to an open RFQ of that vendor if one exists, otherwise a new one. A buyer confirms.

Three conditions must hold for this to work, and when "Odoo did not create the order" one of them is missing: the product has the **Buy** route, it has **at least one vendor line**, and there is a **rule or a need** that triggers it. When a condition fails, Odoo logs an activity on the product for the responsible person; it does not fail silently.

Reordering rules

Inventory › Operations › Replenishment, or the Min / Max button on the product.

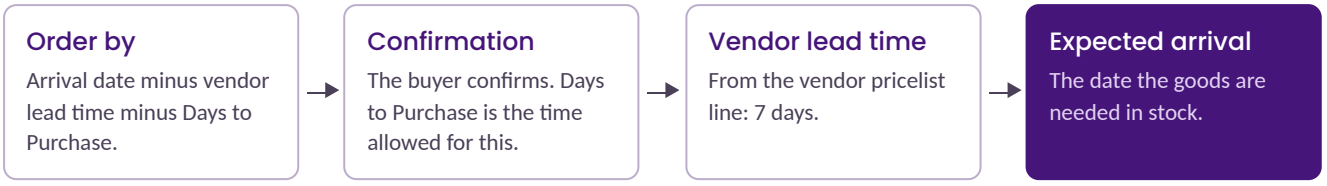
Field	Meaning
Min	When the *forecasted* quantity falls below this, a need is raised. Forecasted means on hand, plus what is coming, minus what is promised.
Max	The level to return to. The quantity ordered is Max minus forecasted.
Multiple	Round the quantity up to a multiple: a full box, a full pallet.
Trigger	**Auto**: the scheduler creates the RFQ. **Manual**: the need appears in the Replenishment report and a person presses Order.
Route, Vendor	Force a route or a vendor for this rule instead of the product's defaults.

CB-63 with Min 200, Max 1,000, Multiple 50, vendor lead time 7 days:

Situation	Forecasted	What happens
On hand 260, nothing promised	260	Nothing: above the minimum.
A delivery of 90 is confirmed	170	Below 200. Need = 1,000 − 170 = 830, rounded up to 850. Draft RFQ for 850.
The RFQ for 850 exists	1,020	Nothing more: the incoming 850 counts in the forecast.

The scheduler runs once a day; it can also be run by hand from Inventory › Operations. A third way, with no rule at all, is the **Replenish** button on the product, for a one-off need.

How dates are computed



Example: components are needed on the 20th, the vendor needs 7 days and the company allows itself 2 days to process an order. The RFQ gets the order deadline of the 11th. If today is already the 14th, the need is late before it starts, and the Replenishment report shows it so. That is why real lead times in the vendor pricelist matter more than any other planning data.

Two helpers for the buyer

The Replenishment report

One line per product that needs attention, with on hand, forecast, the quantity to order and the vendor. Each line can be ordered at once or snoozed. It is the daily screen of a planner who prefers to decide rather than let the scheduler act.

Suggest, in the RFQ catalogue

Inside an RFQ, the Catalog shows the vendor's products. Suggest proposes quantities from past demand: choose the period to look at, how many days to cover and a percentage. The proposal is average daily demand × days to cover, minus what is available and already coming.

9 Purchase and Accounting

A purchase order is not an accounting document. It writes nothing in the books. Accounting starts with the vendor bill, and the order's job is to make that bill correct.

From order to bill

Way to create the bill	How it works
Create Bill on the order	A draft bill with the billable quantity of each line. One bill per vendor and currency when several orders are selected in the list.
Auto-Complete on a new bill	In Accounting, start a bill, choose the vendor, pick the order in Auto-Complete: its lines are loaded.
Upload or e-mail Enterprise	The scanned invoice is read; if it mentions an order number, or amounts match, the bill is linked to the order.

The link is kept line by line: each bill line knows its order line (`purchase_line_id`). That is how Billed on the order is computed, and why a bill line typed by hand, without the link, leaves the order "Waiting Bills" for ever.

Control policy: what may be billed

On ordered quantities

Billable = ordered − billed. The bill can be recorded as soon as the order is confirmed. Suited to services with a fixed price, subscriptions, and vendors who are paid before delivery.

On received quantities

Billable = received − billed. Nothing can be billed until the storekeeper has validated a receipt. Suited to goods. This is the two-way control that stops payment for what did not arrive.

Three-way matching Enterprise

With the setting on, every vendor bill carries a field **Should Be Paid**. Odoo sets it by comparing the bill with the order and the receipt:

Value	Meaning
Yes	Quantity and price on the bill agree with what was ordered and received. Free to pay.
No	The bill claims more than was received. Wait.
Exception	Quantities or prices do not fit: more billed than ordered, a price different from the order. Someone must look.

The treasurer then filters payable bills on Should Be Paid = Yes. A person with the right can override the value by hand, and that override is the control point to audit.

What the bill writes in the books

Take the order of section 6: 100 units at 0.80, VAT 10%, total 88. The entry depends on how the company values its stock, which is set on the product category.

Periodic valuation

Bill	Debit	Credit
Purchases (expense)	80	
Deductible VAT	8	
Accounts payable		88

Goods are expensed when billed. At period end a closing entry brings the stock account to the value of the stock count, against a stock variation account. The classic Iranian and continental method.

Perpetual valuation

Bill	Debit	Credit
Stock valuation (asset)	80	
Deductible VAT	8	
Accounts payable		88

Goods go to the balance sheet when billed. In Odoo 19 the stock account moves with the bill; goods received and not yet billed are picked up by the closing entry as bills to receive.

If you know Odoo 18 or earlier

Until version 18, automated valuation wrote an entry at each receipt: stock valuation debited, an interim "stock received" account credited; the bill then debited the interim account. Odoo 19 redesigned this. Databases that were upgraded, and consultants trained on older versions, will expect the old behaviour. Always post one test receipt and one test bill on the project's own database and read the entries before explaining them to the finance manager.

A service or an untracked consumable always goes to the expense account of its category, whatever the valuation method.

Where each account and value comes from

On the bill	Comes from
Expense or stock account	The product; if empty, its product category.
Payable account	The vendor's Account Payable.
Taxes	The order line (from the product's Vendor Taxes), after the vendor's fiscal position has swapped them.
Due date	The payment terms of the order, which came from the vendor.
Journal	The purchase journal of the company. Several journals can exist, for example one for imports.
Analytic distribution	The order line.
Currency and rate	The order's currency, at the rate of the bill date.

When the bill does not agree with the order

Difference	Treatment
The vendor bills a higher price	The accountant may change the price on the bill line; the bill is posted at the billed price. For goods valued at average or FIFO cost, the cost of the stock still on hand is corrected; with standard cost the gap goes to a price difference account. Three-way matching flags it as Exception.
The vendor bills less quantity	Reduce the quantity on the bill; the order stays Waiting Bills for the rest.
The vendor bills extra charges	Add a line for freight or packing. Either on the order first, so that it is approved, or directly on the bill.
Goods were returned after billing	Credit note from the bill, linked to the same order lines.

What finance reads from purchasing

Payables
Aged Payable and Partner Ledger: what is owed to whom and since when. Fed only by posted bills.

Commitments
Confirmed orders not yet billed. Not in the ledger; read from the Purchase analysis, or from the budget report if budgets are used.

Accruals
Goods and services received but not billed at closing: bills to receive, ذخیره هزینه‌های تعلق‌گرفته.

Iranian practice
The purchase bill is the basis of the VAT credit, so the vendor's national ID or economic code, and the invoice number issued through the tax system (سامانه مودیان), must be on the bill. Goods are entered in stock with a warehouse receipt رسید انبار that carries a serial number, and the accounting voucher refers to it.

In Odoo
Tax ID on the vendor, Bill Reference on the bill, and the receipt's number available through the order. The tax-system reference number and a printed warehouse receipt in the Iranian format are not standard: both are small developments (section 17).

10 Links to other apps

Purchase is a hub. Knowing which app sends what to it, and what it sends back, is what lets an implementer find the cause of a problem in minutes.

App	Sends to Purchase	Receives from Purchase	Bridge module (Technical)
Inventory	Needs from reordering rules and the scheduler; received quantities.	Receipts, expected dates, vendor lead times.	`purchase_stock`
Accounting	Billed quantities, payment state of bills.	Draft bills with accounts, taxes, analytic distribution, terms.	`purchase` (depends on `account`)
Sales	Needs from sales orders: replenish on order, dropship; services to buy for a sale.	Purchase cost and arrival dates behind the promise to the customer.	`sale_purchase`, `sale_purchase_stock`

App	Sends to Purchase	Receives from Purchase	Bridge module Technical
Manufacturing	Component needs from manufacturing orders and the master production schedule Enterprise; subcontracting orders.	Component receipts; the subcontracted product.	`purchase_mrp`, `mrp_subcontracting_purchase`
Project	The project as analytic account on order lines.	Purchase costs in the project's profitability.	`project_purchase`
Quality Enterprise	Pass or fail of checks on receipts.	Receipts to inspect, by product and vendor.	`quality_control`
Approvals Enterprise	Approved purchase requests that become RFQs.		`approvals_purchase`
Barcode Enterprise	Receipts validated by scanning.	Receipts to scan.	`stock_barcode`
Documents, Sign Enterprise	Scanned vendor invoices; signed contracts.	Orders and agreements to file or sign.	`documents_account`
Website / portal	The vendor's confirmation of the delivery date.	RFQs and orders the vendor can read online.	`portal`
Expenses, Fleet, Maintenance, Repair	Occasional needs: a spare part for a repair, a service for a vehicle.	Costs on the vehicle, the equipment, the repair.	Various small bridges

Who creates purchase orders without a buyer typing them

Origin	Shown in the Source field as	Typical question from users
Reordering rule	The rule's reference, e.g. OP/00041	"Why did it order 850 and not 830?" → the multiple.
Sales order (MTO, dropship)	The sales order number	"Why is this RFQ for my customer's address?" → dropship.
Manufacturing order	The manufacturing order number	"Who asked for these components?"
Replenish button	Manual Replenishment	"Who created this?" → the chatter says.
Blanket order	The agreement number	
Approval request Enterprise	The request number	

> **Draft RFQs are a shared basket**
> Automatic needs for the same vendor are added to the vendor's open draft RFQ rather than creating one RFQ each. A buyer who leaves drafts untouched for weeks therefore finds them growing. Reviewing and confirming draft RFQs is a daily task, and the RFQ dashboard's Late counter is its alarm.

11 Data model and processing Technical

What is stored, what is computed, and which method runs when a button is pressed. A functional consultant can skip the code and still use the tables.

The records and how they point at each other

purchase.order
Header: vendor, dates, status, totals.

→

purchase.order.line
Product, quantity, price, taxes. The centre of everything.

→

stock.move
One per line in the receipt. Points back with `purchase_line_id`.

→

account.move.line
The bill line. Also points back with `purchase_line_id`.

Nothing is copied back onto the order. Received and billed quantities are *computed* from the stock moves and bill lines that point to the order line. Delete the link and the order no longer knows.

The order header: `purchase.order`

Field	Label	Notes
`name`	Order Reference	From the sequence with code `purchase.order`: P00012. Given at creation, kept from RFQ to order.
`partner_id`	Vendor	Changing it recomputes currency, terms, fiscal position.
`state`	Status	`draft`, `sent`, `to approve`, `purchase`, `cancel`.
`locked`	Locked	Boolean. Replaces the old `done` status.
`date_order`	Order Deadline, then Confirmation Date	One field, two labels depending on status.
`date_approve`	Confirmation Date	Set by `button_approve`.
`date_planned`	Expected Arrival	The earliest of the lines' dates.
`user_id`	Buyer	Defaults to the vendor's buyer, else the current user.
`origin`	Source	Text: the documents that asked for this order.
`picking_type_id`	Deliver To	Added by `purchase_stock`.
`requisition_id`	Blanket Order	Added by `purchase_requisition`.
`invoice_status`	Billing Status	`no`, `to invoice`, `invoiced`. Computed from the lines.
`receipt_status`	Receipt Status	`pending`, `partial`, `full`. Computed from the receipts.
`acknowledged`	Acknowledged	The vendor confirmed the order or its date.
`amount_untaxed`, `amount_tax`, `amount_total`	Totals	Stored, computed from the lines, in the order's currency.

The order line: `purchase.order.line`

Field	How it gets its value
`product_id`, `name`	Chosen by the user. The description is built from the vendor's product code and name, plus the purchase description.
`product_qty`, unit	Typed. Quantities are converted to the product's own unit for stock.
`price_unit`, `discount`	From the matching vendor pricelist line (`_select_seller`): same vendor, quantity at or above the line's minimum, date inside its validity. No match: the product's cost.
`date_planned`	Order date plus the vendor line's lead time.
`tax_ids`	The product's vendor taxes, mapped by the fiscal position.
`qty_received`	Stock products: the sum of done moves into stock, minus returns. Services and untracked goods: typed (`qty_received_method` = manual).
`qty_invoiced`	The sum of linked bill lines, minus credit notes. Draft bills count; cancelled bills do not.
`qty_to_invoice`	Ordered − billed, or received − billed, according to the product's control policy.
`analytic_distribution`	Typed, or proposed by distribution models.
`display_type`	Marks a line as a section, sub-section or note instead of a product.
`is_downpayment`	Marks a down payment line.

What runs when

Event	Method	What it does
Confirm Order	`button_confirm`	Checks the order has lines; adds the vendor to the products that lack it; asks `_approval_allowed` . If allowed, calls `button_approve` ; if not, status `to approve` .
Approval test	`_approval_allowed`	True when approval is off, or the total is below the company's minimum amount, or the user is a purchase administrator.
Approve	`button_approve`	Status `purchase` , sets `date_approve` , locks if the company locks orders, then creates the receipt (`_create_picking` , in `purchase_stock`).
Validate receipt	`button_validate` on the picking	Moves become done. `qty_received` recomputes; then `qty_to_invoice` and `invoice_status` .
Create Bill	`action_create_invoice`	Builds draft bills from the lines with something to bill, grouped by company, vendor and currency.
Cancel	`button_cancel`	Refuses a locked order and an order with a bill that is not cancelled. Cancels open receipts.
A need from stock	The Buy rule (`stock.rule`)	Finds the vendor, then an open draft order of that vendor to complete, or creates one.
Every day	Scheduled actions	The procurement scheduler evaluates reordering rules. The purchase reminder e-mails vendors before the expected arrival.

A small extension, as an example

Rule wanted by a client: no order may be confirmed without a project or cost centre on every line. Ten lines in a custom module:

models/purchase_order.py

```
from odoo import models, _
from odoo.exceptions import UserError


class PurchaseOrder(models.Model):
    _inherit = 'purchase.order'

    def button_confirm(self):
        for order in self:
            missing = order.order_line.filtered(
                lambda l: not l.display_type and not l.analytic_distribution)
            if missing:
                raise UserError(_(
                    "Set a project or cost centre on every line of %s.", order.name))
        return super().button_confirm()
```

The pattern is always the same: inherit the model, do the extra check or action, call `super()`. Because confirmation, approval and receipt creation are separate methods, each can be extended without touching the others.

> **Things worth knowing before writing reports or integrations**
> The Purchase analysis reads `purchase.report`, a database view, not a table: it cannot be written to, and custom fields need the view's query extended. Amounts there are converted to the company currency. Order numbers come from one sequence per company. Chatter keeps the history of status changes and, after confirmation, of quantity changes on lines.

12 Access rights

The Purchase app has two roles. Real control comes from combining them with the roles of Inventory and Accounting so that no single person can order, receive and pay.

The two roles of the app

Settings › Users, the Purchase line on the user form.

Role	Group Technical	Can
No access		Does not see the app. Can still be a requester through Approvals, or see purchase costs in other apps only if those apps show them.
User	`purchase.group_purchase_user`	Create, edit, send, confirm and cancel RFQs and orders; create vendor bills from them; read the analysis. Reads vendors, products and vendor prices but does not maintain them through this role. An order above the approval limit stops at To Approve.
Administrator	`purchase.group_purchase_manager`	Everything a user can, plus: approve orders, confirm without limit, unlock locked orders, create and edit vendors and vendor pricelists, change settings.

What the record rules do Technical

Rule	Effect
Multi-company	Users see orders and lines of the companies they are allowed in, no others.
Portal	A vendor with portal access sees only the orders addressed to his own company.
Bills for purchase users	A purchase user with no accounting role can open vendor bills, refunds and purchase receipts, not customer invoices or journal entries.
Accounting users	An accounting user can open and edit purchase orders, to link bills, but cannot create or delete them. A read-only accountant can only read them.
Own documents	**There is none.** Unlike Sales, every buyer sees every order of his company.

When buyers must see only their own orders, two record rules are added. No Python is needed; they can be created in developer mode or shipped in a module:

security/purchase_rules.xml

```xml
<record id="rule_po_own" model="ir.rule">
    <field name="name">Purchase orders: own documents</field>
    <field name="model_id" ref="purchase.model_purchase_order"/>
    <field name="domain_force">[('user_id', 'in', (user.id, False))]</field>
    <field name="groups" eval="[(4, ref('purchase.group_purchase_user'))]"/>
</record>
<record id="rule_po_all" model="ir.rule">
    <field name="name">Purchase orders: all documents</field>
    <field name="model_id" ref="purchase.model_purchase_order"/>
    <field name="domain_force">[(1, '=', 1)]</field>
    <field name="groups" eval="[(4, ref('purchase.group_purchase_manager'))]"/>
</record>
```

The second rule is needed because an administrator is also a user: rules of a person's groups are combined with OR, so the wider one wins. The same pair is needed on `purchase.order.line`.

Roles in a real department

Person	Purchase	Inventory	Accounting	Does
Requester	none	none	none	Asks, through an approval request or a message. Does not order.
Buyer	User	none or read	none	RFQs, negotiation, orders below the limit, follow-up of late deliveries.
Purchasing manager	Administrator	none or read	none	Approves, signs agreements, owns vendor data and settings.
Planner	User	User	none	Reordering rules, replenishment report.
Storekeeper	none	User	none	Validates receipts and returns. Should not see prices.
Accounts payable	none or User	none	Invoicing or accountant	Records bills against orders; resolves exceptions.
Treasurer	none	none	Accountant, with payments	Pays bills that are due and marked Should Be Paid.
Finance manager, auditor	read	read	Read-only or adviser	Reviews. A read-only purchase role is not standard; it is a small custom group.

Segregation of duties

Should not be the same person	Because otherwise
Creating a vendor and paying it	A fictitious vendor can be paid.
Ordering and approving one's own order	The approval limit means nothing.
Ordering and receiving	Goods that never arrived can be "received".
Receiving and recording the bill	The two-way control between warehouse and accounts disappears.
Recording the bill and paying it	A false invoice can be entered and paid by one hand.

> **In small companies**
> With five people, full separation is impossible. Keep at least two: the person who pays is not the person who orders, and vendor bank accounts are changed by someone who does not pay. Then let a manager review the Purchase analysis and the Aged Payable each month.

Finer control, when asked for

Request	How
Buyers limited to some product categories or vendors	Record rules on orders and lines. Configuration
Storekeepers must not see prices on receipts	Standard: receipts show no price. Keep storekeepers without the Purchase role. Standard
Hide the cost of products from some users	Field-level groups through Studio Enterprise or a small module. Development
Approval by amount bands and by department	Approvals app, Studio approval rules Enterprise, or a tier-validation module. Configuration or Development
A vendor sees his orders online	Grant portal access from the contact. Standard
Who changed what	The chatter of each order; for master data, tracked fields. Standard

13 Reports and indicators

Purchasing has one analysis screen of its own. The rest of what a purchasing manager needs is read in Inventory and Accounting, from the documents purchasing created.

The Purchase analysis Functional

Purchase › Reporting › Purchase. One screen with a chart view and a pivot view over all order lines. Choose a measure, group by one or two dimensions, filter, and save the result as a favourite or put it in a spreadsheet Enterprise.

Measure	What it tells
Untaxed Total, Total	Spend, in company currency. Untaxed Total is the default.
Qty Ordered, Qty Received, Qty Billed, Qty to be Billed	Volumes, and what is still open on each side.
Average Cost	The average unit price paid. Grouped by month, it is the price history of a product.
Days to Confirm	From creation of the RFQ to confirmation: the speed of the purchasing department.
Days to Receive	From confirmation to receipt: the real lead time of the vendor.
# of Lines, Count	Workload.
Gross Weight, Volume	For transport planning, if products carry weight and volume.

Dimensions to group and filter by: vendor, vendor country, buyer, product, product category, status, company, order date, confirmation date.

Question	Measure, grouped by
Who are our ten largest vendors?	Untaxed Total, by vendor, sorted, confirmed orders this year.
Where does the money go?	Untaxed Total, by product category, then by month.
Is this product getting more expensive?	Average Cost, by month, filtered on the product; add vendor as second level.
Which vendor is cheapest for the same item?	Average Cost, by product, then vendor.
Which vendor is slow?	Days to Receive, by vendor.
Is the department keeping up?	Days to Confirm and # of Lines, by buyer.
What have we ordered and not yet been billed for?	Qty to be Billed and Untaxed Total, by vendor, confirmed orders.

Other screens

Screen	Where	Use
RFQ dashboard	Top of the RFQ list	To Send, Waiting, Late; for everyone and for me. The buyer's morning screen.
On-time Delivery Rate	Vendor form	Share of quantities received on or before the expected date.
Purchase & Vendor analysis Enterprise	Dashboards app, Logistics	A ready dashboard: purchased value, average order value, number of orders, quantity, days to confirm and to receive, service level, on-time deliveries, with charts by vendor, category, buyer and country.
Late receipts	Inventory › Receipts, filter Late	What should have arrived. The follow-up list.
Replenishment	Inventory › Operations	What must be ordered now, and what is already late.
Forecast	Product › Forecasted	Day by day: stock, incoming receipts, outgoing needs for one product.
Stock valuation, moves analysis	Inventory › Reporting	Value received in a period; quantities by vendor.
Aged Payable, Partner Ledger	Accounting › Reporting	Debt to vendors by age; the account of one vendor.
Bills analysis	Accounting › Reporting › Invoice Analysis, vendor bills	Actual billed spend, including bills that had no order.
Budget report	Accounting › Budgets Enterprise	Budget against committed (ordered) and actual (billed) amounts.

Printed documents

Two PDF layouts come with the app: the **Request for Quotation**, without prices, and the **Purchase Order**, with prices, taxes, terms and expected dates. Both use the company's document layout: logo, colours, footer. Changes to their content are made in Studio Enterprise or by inheriting the QWeb templates `purchase.report_purchasequotation_document` and `purchase.report_purchaseorder_document` Technical. E-mail texts are templates too, editable in Settings › Technical › Email Templates.

Indicators a purchasing manager should have

Indicator	Formula	Read it in	
Spend	Untaxed total of confirmed orders in the period	Purchase analysis	Standard
Spend concentration	Share of spend with the top 10 vendors	Purchase analysis, by vendor	Standard
Order cycle time	Confirmation date − RFQ creation date	Days to Confirm	Standard
Vendor lead time	Receipt date − confirmation date	Days to Receive	Standard
On-time delivery	Quantity received on time ÷ quantity received	Vendor form; dashboard Enterprise	Standard
Price trend	Average cost this period ÷ last period − 1	Average Cost by month	Standard
Open commitments	Value of ordered and not billed	Purchase analysis; budget report	Standard
Spend without order	Vendor bills with no order ÷ all vendor bills	Bills analysis	Configuration
Bill price variance	(Billed price − ordered price) × quantity	Three-way exceptions; custom report	Development
Savings	(Reference price − price paid) × quantity	Needs a reference price field	Development
Reject rate	Quantity failed at inspection ÷ quantity received	Quality app Enterprise	Configuration
Urgent orders	Orders with expected arrival sooner than the vendor's lead time ÷ all orders	Custom filter or field	Development

Agree on four or five of these with the client's purchasing manager at the start of the project. They decide which data must be clean: lead times for the delivery indicators, vendor prices for the price ones, product categories for the spend ones.

Part C Real businesses

14 Seven kinds of company

The same app serves very different purchasing departments. Before configuring anything, recognise which of these the client is. Most are a mix of two.

Company	How it buys	What to set up	Expect to be asked for
Trader, distributor	Finished goods for resale, in volume, from a stable list of vendors. Margin depends on purchase price and on not running out.	Vendor pricelists with quantity breaks; reordering rules on every stock item; bill control on received quantities; dropshipping for items not stocked.	Price comparison across vendors; last purchase price on the line; purchase rebates.

Company	How it buys	What to set up	Expect to be asked for
Manufacturer	Components and raw materials driven by bills of materials and the production plan; some operations subcontracted.	Buy route with reordering rules for common parts, replenish on order for special ones; blanket orders; subcontracting; quality checks on receipt Enterprise.	Delivery schedules; vendor evaluation; approved vendor list per part.
Contractor, project company	Everything is bought for a project, often from the site, against a project budget.	Analytic distribution required on lines; replenish on order; approval; a warehouse or location per site; services on received quantities.	Purchase requests from site; budget check; retention on subcontractor bills; multi-level approval.
Retail chain	Central purchasing for many shops; thousands of items with sizes and colours.	A warehouse per shop with resupply from the central one; variant grid; barcode Enterprise; reordering rules per shop.	Allocation of one receipt to shops; seasonal buying plans.
Service company	Indirect purchases: software, rent, travel, equipment, outsourced work. Low volume, many requesters.	Service products by expense type; approval with a low limit; control on ordered quantities for fixed fees; analytic by department.	Purchase requests; budgets per department; contract renewals.
Importer	Few, large orders in foreign currency, months of lead time, many extra costs between the vendor and the shelf.	Currencies and rates; long lead times on vendor lines; landed costs; incoterms; prepayments; a purchase journal for imports.	The import file: proforma, order registration, currency allocation, customs; cost per shipment.
Public body, large group	By regulation: thresholds, three quotations, a tender committee, everything documented.	Purchase agreements and alternatives; approval; locked orders; documents attached to RFQs; strict access rights.	Committee minutes and comparison sheet; approval by bands; vendor registration and qualification.

How to use this table

In the first workshop, describe the client back to itself with one of these rows. If the purchasing manager agrees, the middle column is the first draft of the configuration and the right column is the first draft of the gap list.

15 Five world-class buyers in Odoo

Five companies known for how they buy, each built around a different idea. For each: what is publicly known of its practice, how the same idea is set up in Odoo, and where standard Odoo stops.

These are teaching models. None of these companies runs its purchasing on Odoo, and their real systems are far larger than anything shown here. The point is the idea behind each, at the scale of the companies you implement for. Each line is marked Standard works as installed, Configuration needs set-up, or Development needs development.

Toyota — Pull: buy only what was just used

How it buys

- **Just-in-time.** Parts arrive in small lots, often several times a day, as the assembly line consumes them. The signal is a kanban: an empty container asks for a full one.
- **Few suppliers, kept for decades.** Cost is reduced together with the supplier, year after year, more than by changing supplier.
- **A forecast for months, firm quantities for days.** Suppliers plan on the forecast and deliver on the call-off.
- **Quality at the source.** The supplier is responsible for defect-free parts; incoming inspection is the exception.

The same idea in Odoo

Practice	Set-up	
Long-term price and volume	One blanket order per supplier and part family, valid for the year.	Standard
The kanban signal	A reordering rule per part: minimum of one or two containers, maximum just above, multiple equal to the container quantity, trigger Auto.	Configuration
Frequent small deliveries	Lead times of one or two days on vendor lines; the scheduler set to run several times a day instead of once.	Configuration
Needs from the production plan	Manufacturing orders and the master production schedule Enterprise raise the component needs; the Buy route turns them into RFQs.	Standard
Supplier performance	On-time delivery rate; quality checks only for new parts or suppliers on probation Enterprise.	Configuration
Forecast and firm schedule sent to suppliers	A delivery-schedule document per agreement, with firm and forecast periods.	Development
Supplier scorecard	Quality, delivery and cost in one score per supplier and period.	Development

Walmart Scale: volume, data and discipline

How it buys

- **Direct from manufacturers, in huge volume,** at the lowest sustainable cost.
- **Through distribution centres with cross-docking.** Goods move from the supplier's truck to the store's truck with little or no storage.
- **Shared data.** Suppliers see sales and stock of their own products; for many items the supplier proposes the replenishment (vendor-managed inventory).
- **Electronic documents.** Orders, shipping notices and invoices travel between systems, not by e-mail.
- **On time, in full.** Deliveries are measured, and failing has a cost for the supplier.

The same idea in Odoo

Practice	Set-up	
Stores fed by distribution centres	A warehouse per centre and per store; resupply routes from centre to store; reordering rules at store level that pull from the centre, and at centre level that buy.	Configuration
Cross-docking	The cross-dock route on the warehouse, with multi-step routes.	Configuration
Volume prices	Vendor pricelist lines by quantity and period; blanket orders.	Standard
Pay only for what arrived	Bill control on received quantities and three-way matching Enterprise.	Standard
Fast receiving	Barcode app and packages Enterprise.	Configuration
Vendor-managed inventory	A portal page where the vendor sees stock and sales of his items and proposes orders.	Development
Electronic orders, shipping notices, invoices	An EDI connector per trading partner or network.	Development
Penalties for late or short deliveries	Computed from receipts against expected dates and quantities; debit notes to the vendor.	Development

Apple Control: own the supply chain, not the factories

How it buys

- **Contract manufacturing.** Products are designed in-house and assembled by partners.
- **Components chosen and negotiated by Apple itself,** then directed to the assemblers.
- **Supply secured in advance** with long-term agreements and large prepayments to key component makers.
- **Equipment and tooling paid for by Apple** and placed in suppliers' plants.
- **Very little stock,** and a published code of conduct with supplier audits.

The same idea in Odoo

Practice	Set-up	
Contract manufacturing	Subcontracting bills of materials; a purchase order to the assembler for the finished product, priced for the work.	Configuration
Components sent straight to the assembler	Dropship Subcontractor on Order: the component vendor delivers to the subcontractor's location.	Configuration
Long-term supply agreements	Blanket orders with validity dates.	Standard
Prepayments	Advance vendor payments on a prepayments account, matched with later bills.	Configuration
From factory to customer	Dropshipping of the finished product from the subcontractor.	Configuration
Traceability of every unit	Serial numbers recorded at receipt.	Standard
Capacity reserved by contract, take-or-pay	A contract object with committed volumes and consequences.	Development
Tooling at suppliers; supplier audits	A register of assets placed at suppliers; audit records with follow-up.	Development

Amazon Automation: algorithms place the orders

How it buys

- **Orders generated by systems** from demand forecasts, in regular cycles. People handle exceptions.
- **A vendor portal.** Vendors receive orders, confirm quantities and dates, announce shipments and send invoices there.
- **Several sources for the same item,** chosen by the system.
- **Strict inbound rules** on labels, packaging and appointments, with chargebacks when they are broken.
- **Invoices matched automatically** against order and receipt.

The same idea in Odoo

Practice	Set-up	
Automatic ordering	Reordering rules with trigger Auto on every stock item; Suggest for the buyer's own RFQs.	Configuration
Several vendors per item	Several vendor lines; their order decides; a rule can name its vendor.	Standard
Vendors confirm online	Portal access; the receipt reminder with date confirmation.	Standard
Automatic invoice matching	Bill digitisation and three-way matching Enterprise.	Standard
Forecast-driven quantities	A forecasting engine outside Odoo that rewrites minimum and maximum of the rules by import or API.	Development
Automatic choice of the best vendor	Selection by price, lead time and past performance instead of list order.	Development
Shipment notices, appointments, chargebacks	Portal extensions and penalty documents.	Development

IKEA Design to cost: the price comes first

How it buys

- **The target price is set before the product is designed.** Material, design and supplier are chosen to meet it.
- **Long-term contracts** with suppliers in many countries, handled by regional purchasing offices.
- **Flat packs.** Products are designed to fill pallets and containers, because transport is a main cost.
- **A supplier code of conduct** on working conditions and environment, audited, as a condition of doing business.
- **Origin of materials,** wood above all, is traced.

The same idea in Odoo

Practice	Set-up	
Long-term prices by volume and period	Blanket orders; vendor pricelist lines with validity dates.	Standard
Purchasing offices in several countries	Multi-company with inter-company transactions Enterprise ; several currencies.	Configuration
Buying by pallet and container	Packagings; multiples on reordering rules.	Configuration
Transport and duty in the cost	Landed costs; incoterms on orders.	Standard
Origin of materials	Lots at receipt, with origin recorded on the lot.	Configuration
Target cost and cost breakdown per product	A cost model by material, labour, transport and margin, compared with quotations.	Development
Supplier qualification and audits	An approved vendor list with status, expiry and blocking of orders.	Development
Container load planning	Filling orders up to full containers by volume and weight.	Development

The five side by side

Company	Central idea	Main levers in Odoo	Where standard stops
Toyota	Pull, small lots, partners	Reordering rules, blanket orders, lead times	Delivery schedules, scorecards
Walmart	Volume, flow, shared data	Multi-warehouse routes, price breaks, three-way matching	Vendor-managed stock, EDI, penalties
Apple	Control without ownership	Subcontracting, dropship to subcontractor, prepayments	Capacity contracts, tooling, audits
Amazon	Automation and portals	Automatic rules, several vendors, portal, bill matching	Forecasting, vendor selection, chargebacks
IKEA	Cost designed in, long contracts	Blanket orders, packagings, landed costs, multi-company	Target costing, qualification, load planning

What the five teach an implementer

In all five, the daily transaction is the plain flow of section 6: order, receipt, bill. What makes each one special sits *around* the order: how the need is detected, how the vendor is bound by contract, and how the vendor is measured. Standard Odoo covers the transaction and the detection of need well, the contract partly, and the measurement of vendors least. Expect a client's development requests in that same order.

Part D Implementing

16 The implementation method

Purchase is quick to switch on and slow to get right, because it depends on three other teams. The work is mostly asking, deciding and cleaning data.

1 Discover	2 Decide	3 Configure	4 Load	5 Test	6 Go live
2 to 3 workshops	Decision sheet	Test database	Templates	Key users	First month
How they buy today, who does what, which documents exist.	Each setting and rule, with the name of who decided.	Settings, roles, routes, journals, document layouts.	Vendors, products, prices, rules, open orders.	Their own cases, end to end, with finance present.	Training by role, daily checks, corrections.

Questions for the discovery workshops

Organisation and control

- Who may ask for a purchase, and how do they ask today?
- Who chooses the vendor? Who signs the order?
- Are there approval limits? By amount, department, type of purchase?
- Must several quotations be collected? From what amount?
- Who receives the goods, and who confirms a service was done?

Vendors and prices

- How many active vendors? How many per item, typically?
- Are there contracts with fixed prices or volumes?
- Foreign vendors, currencies, prepayments?
- Are vendors evaluated? On what?

Products and stock

- What is bought for stock, and what for a specific order or project?
- Which units do vendors sell in? Do they differ from the stock units?
- Is anything inspected on arrival? Lots, serial numbers, expiry dates?
- How is it decided today what to order and when?

Finance and reporting

- Is the invoice checked against the receipt before payment? By whom?
- How is stock valued, and when is a purchase expensed?
- Is spend followed per project, department or budget?
- Which reports does the purchasing manager look at each month?

The decision sheet

#	Decision	Options	Decided with
1	Is approval needed, and from what amount?	None; one level by amount; more levels (development)	General and finance managers
2	Are confirmed orders locked?	Lock; leave editable	Purchasing manager
3	Default bill control	Ordered; received. Per product type.	Finance manager
4	Three-way matching Enterprise	On; off	Finance manager
5	Purchase agreements	Blanket orders, templates, alternatives; none	Purchasing manager
6	Receipt steps per warehouse	One; two; three	Warehouse manager
7	How needs are raised	By hand; reordering rules, manual; reordering rules, automatic; from sales	Planner
8	Inventory valuation and costing method	Periodic or perpetual; standard, average, FIFO	Finance manager
9	Analytic on purchase lines	Not used; optional; required	Finance manager
10	Units and packagings	One unit; purchase unit differs	Warehouse and purchasing
11	Roles of each named user	The matrix of section 12	Each manager
12	Order numbering and printed layout	Standard; prefix per year or type; custom layout	Purchasing manager

The order of configuration

1. **Accounting first.** Chart of accounts, taxes, purchase journal, payment terms, currencies, fiscal positions. A purchase order can be confirmed without them; a bill cannot be right.
2. **Inventory.** Warehouses, receipt steps, units, product categories with their accounts and costing method.
3. **Purchase settings,** from the decision sheet.
4. **Users and roles.** Test each role with a real login, never as administrator.
5. **Master data,** in the order below.
6. **Reordering rules,** on a first group of products.
7. **Document layouts and e-mail templates.**
8. **Developments,** only after the standard flow has been seen working by the key users.

Data to load

#	Data	Minimum fields	Care
1	Vendors	Name, tax ID, address, payment terms, currency, payable account, bank account	Remove duplicates before, not after. One contact can be vendor and customer.
2	Product categories	Name, parent, accounts, costing method	Agree the tree with finance: it drives the accounts.
3	Products	Name, internal reference, type, category, unit, vendor taxes, control policy, routes	The internal reference is the key for every later import.

#	Data	Minimum fields	Care
4	Vendor pricelists	Vendor, product, price, minimum quantity, lead time, currency, validity	Import from Configuration › Vendor Pricelists. Lead time is not optional.
5	Reordering rules	Product, warehouse, min, max, multiple, trigger	Start with manual trigger; switch to Auto when the proposals look right.
6	Open orders at cut-over	Vendor, lines with the *remaining* quantity, price, expected date	See below.
7	Blanket orders in force	Vendor, validity, products, remaining quantity, price	Enter by hand; there are rarely many.

Open orders: the usual case

For each order not fully received on the cut-over date, create an order in Odoo for the quantity still to come, and put the old order number in Vendor Reference. Confirm them, so that receipts exist on day one. What was received before cut-over comes in through the opening stock; what was billed before comes in through the opening balance of payables.

Received, not yet billed

Goods received before cut-over whose invoice has not arrived are the delicate part. They are in opening stock already. Agree with finance how they are booked in the opening entry, and record the later bill against that account, without a purchase order, so that stock is not counted twice.

Acceptance tests with the key users

#	Test	Passed when
1	A stock item, standard flow, as buyer, storekeeper and accountant with their own logins	Each could do his step and no other; quantities and the entry are right.
2	An order above the approval limit	It stops; the manager is notified; the receipt appears only after approval.
3	Partial receipt, backorder, then the rest	Two receipts, two possible bills, order closed at the end.
4	Return of part of a receipt after billing	Stock down, credit note linked, vendor balance correct.
5	A service bought and billed	No receipt; expense account and analytic correct.
6	A bill with a different price than the order	The difference is visible and lands where finance expects.
7	A product in a purchase unit different from the stock unit	Stock quantity and unit cost are right.
8	A reordering rule triggered by a delivery	The RFQ has the right vendor, quantity, price and date.
9	A foreign-currency order, billed and paid at different rates	The exchange difference is posted.
10	Each special scenario of this client from section 7	The key user did it alone, from the training notes.
11	The monthly reports of the purchasing manager	He recognises his numbers.

Training by role, and the first month

Role	Teach
Buyer	Sections 3, 4, 6, their scenarios of 7, the RFQ dashboard.
Storekeeper	Receipts, backorders, returns. Why the receipt releases the bill.
Accounts payable	Bills from orders, control policy, three-way status, credit notes.
Planner	Section 8 in full.
Manager	Approval, sections 12 and 13.

Daily checks during the first month

Draft RFQs older than three days. Orders in To Approve. Receipts past their date. Orders in Waiting Bills for more than two weeks. Vendor bills with no purchase order. Each of these lists is a symptom of a habit that has not changed yet; follow them up with the person, not with the system.

17 Developments often needed

Standard Purchase is deliberately lean. These are the requests that come up in almost every sizeable project, with the cheapest honest way to meet each.

Before agreeing to any development

Try in this order: change the process to fit the standard; configure, including Studio and the Approvals app where the client has Enterprise; use a maintained community module, after checking that it exists for version 19 and reading its code; only then write custom code. Sizes below are rough: S a few days, M one to three weeks, L more.

Need	What is asked	Ways to meet it	Size
Before the order			
Purchase request درخواست خرید	Any employee asks for items; a manager approves; purchasing turns approved lines into RFQs and the requester sees progress.	Approvals app with a "create RFQ" category Enterprise; community purchase-request module; custom.	M
Approval by levels	Bands of amount, each with its approver; by department or type of purchase; delegation during absence.	Studio approval rules Enterprise; community tier-validation module; custom.	M
Budget check	Warn or block when an order would exceed the budget of its project or department.	Budgets show committed amounts Enterprise; the block itself is custom.	M
Comparison sheet and committee کمیسیون معاملات	A printed comparison of quotations, signed by the members; the winner recorded with the reason.	A report over the alternatives, plus fields for members and decision.	S–M
Approved vendor list	Only qualified vendors may be ordered from, per product family; qualification expires.	Vendor warnings set to blocking, as a stopgap Standard; custom for the real thing.	M
The order itself			

Need	What is asked	Ways to meet it	Size
Order types	Local, import, service, capital: each with its numbering, defaults and approval.	Community order-type module; custom.	S
Revisions	A changed order becomes revision 2; revision 1 is kept and visible.	Community revision module; custom.	S
Contract ceilings	Block call-offs beyond the blanket order's quantity, value or end date.	A constraint on confirmation.	S
Delivery schedule	One line, many delivery dates; firm and forecast periods sent to the vendor.	Custom, on top of blanket orders.	M
Mandatory data	No confirmation without project, attached quotation, or a reason for choosing the vendor.	Studio rules Enterprise; a few lines of code (section 11).	S
Price history on the line	Last price, last vendor, average of the year, shown while ordering.	Computed fields from past order lines.	S
Receipt and import			
Receipt tolerance	Accept up to 5% more or less than ordered, block beyond.	A check on receipt validation.	S
Warehouse receipt form رسید انبار	The printed receipt in the client's format, with its own numbering and signatures.	A QWeb report on the receipt.	S
Import file پرونده واردات	One file per shipment: proforma, order registration ثبت سفارش, currency allocation, letter of credit, insurance, transport, customs declaration, clearance; all costs gathered and spread on the goods.	A custom "import file" object linking orders, bills and landed costs. Landed costs themselves are standard.	L
Bill, payment and after			
Advance payment request	The buyer asks for a prepayment on an order; finance approves and pays; it is deducted from the bill.	Payment linked to the order, with an approval step.	S–M
Retentions on contractor bills	Good-performance retention سپرده حسن انجام کار and social-insurance retention سپرده بیمه withheld from each progress bill and released later.	Withholding taxes configured as negative taxes, for simple cases Configuration; custom for release tracking.	M
Tax-system data سامانه مودیان	The tax-system reference of each purchase invoice stored and checked; purchase data for statutory returns.	Fields and reports in the localisation module.	M
Jalali dates	Solar Hijri calendar on screens, reports and document numbers.	Normally part of the Iranian localisation already in the project.	–
Vendor evaluation	A periodic score per vendor from delivery, quality, price and service, with ranking.	Computed from receipts, quality checks and orders, plus manual criteria.	M
Vendor portal, extended	Vendors enter their quotation, upload documents, announce shipments online.	Extension of the standard portal pages.	M–L
Integration	Orders and invoices exchanged with vendors' systems or marketplaces.	API or EDI connector per partner.	L

Community modules are named generically on purpose: check on the Odoo Community Association's purchase repositories which ones are published for the version of the project, and treat their code as code you will have to maintain.

18 Common mistakes

The same dozen problems appear in most projects. Nearly all come from data or habits, not from the software.

Mistake	What you see	Cure
No lead time on vendor lines	Every automatic order is "late"; expected dates equal order dates.	Load real lead times; review with Days to Receive after two months.
Bills typed in Accounting without the order	Orders stay in Waiting Bills; spend counted in two places.	Train accounts payable on Create Bill and Auto-Complete; monitor bills with no order.
Wrong control policy	"Create Bill gives an empty bill", or bills for goods not received.	Received for goods, ordered for fixed-fee services; set the default before importing products.
Everyone is Administrator	Approval never triggers; settings change by accident.	One or two administrators; test with real logins.
Receipts validated late, in batches	Stock wrong all day; bills blocked; buyers chase goods that are on the shelf.	Receive at the dock, by barcode if possible.
"No Backorder" by reflex	Remaining quantities vanish; shortages nobody ordered for.	Set the operation type to always create a backorder.
Draft RFQs ignored	Dozens of old drafts growing with each scheduler run.	A daily review; the Late counter.
Reordering rules on everything from day one	Hundreds of proposals nobody trusts.	Start with the items that matter, manual trigger, then widen.
Unit conversion not tested	Stock 12 times too high or cost 12 times too low.	One full test order per unit before go-live.
Duplicate vendors and products	Spend split across duplicates; prices not found.	Clean before import; restrict who creates master data.
Three receipt steps with one storekeeper	Transfers waiting in every stage.	As many steps as real handovers, no more.
Valuation explained from memory of an older version	The finance manager finds entries he was told would not exist.	Post a test receipt and bill on the project database and read them together.
Developing before seeing the standard	Custom screens that duplicate existing ones.	Show the standard flow to key users first; list gaps afterwards.

19 Cheat sheet and self-check

Where is it?

I want to	Go to
Create an RFQ	Purchase › Orders › Requests for Quotation › New
See confirmed orders	Purchase › Orders › Purchase Orders
Set a vendor's price and lead time	Product › Purchase tab, or Purchase › Configuration › Vendor Pricelists
Create a blanket order or template	Purchase › Orders › Purchase Agreements
Compare quotations	RFQ › Alternatives tab › Compare Product Lines
Set the approval limit	Purchase › Configuration › Settings, Purchase Order Approval
Choose ordered or received billing	Product › Purchase tab › Control Policy
Receive goods	The Receipt button on the order, or Inventory › Receipts
Return goods	The validated receipt › Return
Create the bill	The order › Create Bill, or a new bill › Auto-Complete
Set minimum and maximum stock	Product › Min / Max, or Inventory › Operations › Replenishment
Add freight and customs to cost	Inventory › Operations › Landed Costs
Give a role to a user	Settings › Users, Purchase
Analyse spend	Purchase › Reporting › Purchase
See what is owed to vendors	Accounting › Reporting › Aged Payable

"Why did Odoo…?"

Question	Usual answer
… put this price on the line?	The vendor pricelist line matching vendor, quantity and date; with none, the product's cost.
… not create a receipt?	The product is a service or is not tracked in stock; or the order is waiting for approval.
… give an empty bill?	Control policy is on received quantities and nothing has been received.
… leave the order in Waiting Bills?	A quantity is still to bill: a receipt not billed, or a bill typed without link to the order.
… not create an RFQ from the rule?	No Buy route, no vendor line, forecast above the minimum, or the scheduler has not run yet.
… add lines to an RFQ I did not touch?	Automatic needs join the vendor's open draft RFQ.
… refuse to cancel the order?	It is locked, or it has a bill that is not cancelled.
… not ask for approval?	The total is below the minimum amount, or the user is an administrator.

Check yourself

#	Question	Answer
1	What is the difference between an RFQ and a purchase order in the database?	None but the status: the same record.
2	Which three things must exist for a reordering rule to create an RFQ?	The Buy route, a vendor line, forecast below the minimum.
3	Where does the expected arrival date come from?	Order date plus the lead time of the vendor pricelist line.
4	A product is on "received quantities", 100 ordered, 60 received, 0 billed. How many can be billed?	60.
5	Who can approve an order in To Approve?	Any purchase administrator.
6	Does confirming a purchase order write an accounting entry?	No. Accounting starts with the bill.
7	What does confirming a blanket order change on the product?	It adds the agreed price as a vendor pricelist line.
8	How is a received quantity stored on the order line?	It is not stored by hand: computed from the stock moves linked to the line.
9	Can a buyer see another buyer's orders?	Yes, in standard. Restricting it needs record rules.
10	Name the three documents of the three-way match.	Purchase order, receipt, vendor bill.
11	Which report gives the real lead time of a vendor?	Purchase analysis, Days to Receive by vendor.
12	What is checked first when a client asks for a development?	Whether a change of process or a setting already answers it.

The whole guide in five lines

Purchasing is six steps and three documents: order, receipt, bill. Odoo keeps them consistent by linking each receipt line and bill line to its order line. Prices and dates come from the vendor pricelist; needs come from routes and reordering rules; control comes from roles, approval and bill control. Standard covers the transaction; contracts, requests and vendor evaluation are where projects extend it. Implementing it well is mostly decisions and clean data.