Spend Analysis & Maverick

User Guide · Odoo 18.0 & 19.0

Spend by category/supplier with off-contract (maverick) buying flags

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1. Overview

Spend Analysis & Maverick-Buy Dashboard
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Procurement spend is usually invisible: nobody can quickly answer "how much did we spend with each supplier, in each category, and how much of it was bought off-contract?". This module makes spend visible and flags maverick buying.

What it does ---------- * Approved-Supplier and Preferred-Category registers: define which suppliers are on contract for which product categories, with optional contract value caps. * Every confirmed purchase order line is evaluated: if the supplier is not an approved supplier for that product's category (or a contract cap is breached), the line is flagged as a maverick / off-contract buy with a reason. * A spend-analysis SQL report model aggregates confirmed PO lines by supplier, category, period and maverick flag, exposed through pivot, graph and list views for a self-service dashboard. * KPIs per supplier and per category: total spend, on-contract spend, maverick spend and maverick percentage.

No external service is required; everything is computed from your purchase data.

2. Installation

Open Apps, click Update Apps List, search for “Spend Analysis & Maverick” (technical name **gb_spend_analysis_maverick_buy_dashboard**) and press Install. The module supports Odoo 18.0 and 19.0, Community and Enterprise.

3. Menus & Navigation

After install the following menus become available:

- Spend Analysis
- Dashboard
- Supplier Contracts
- Build Contracts from Spend

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
gb.spend.report	Procurement Spend Analysis
gb.supplier.contract	Approved Supplier Contract
gb.contract.builder.wizard	Build Contracts from Spend History

5. Typical Workflow

1. Open the app's Configuration menu and set up the master data / policies it needs.
2. Create the main operational record from its primary menu.
3. Use the action buttons on the form (e.g. Confirm / Compute / Post / Generate) to run the engine.
4. Review the results in the list, pivot and report views; export or post where applicable.

6. Support

Email **support@pokutsoft.com** or visit **https://pokutsoft.com**. Please include your Odoo version (18.0 / 19.0) and the module technical name.