

## UNDERSTANDING DOCUMENT OF ADD\_USER FUNCTIONALITY

Step 1:

- \* Go to sale->customer-> open record -> click on “Add user” tab
- \* Enter User name and select server
- \* Click Add User button

The screenshot displays the routesms CRM interface. The top navigation bar includes tabs for Messaging, Sales, Accounting, Warehouse, Human Resources, and Reporting. The left sidebar lists various modules: Sales (Customers, Leads, Opportunities, Quotations, Proforma, Customer Search), After-Sale Services (Helpdesk and Support), Phone Calls (Logged Calls), Products (Products), Configuration (Pricelists), and a footer note 'Powered by Odoo'.

The main content area is titled 'Customers / 01telecom.net'. It features a 'Save' or 'Discard' button and a '1 / 40' indicator. The customer details form includes fields for Name (01telecom.net), Address (Street..., City, State, ZIP, Morocco), Website (e.g. www.odoo.com), Routesms Customer Id, Routesms Remark (PARTNER IMPORTED VIA SHEET-LEAD ONLY), and Domain (01telecom.net). Summary statistics show 1 Opportunity, 0 Meetings, 0 Calls, and 0 Sales.

Below the form, a tabbed interface includes 'Contacts', 'Internal Notes', 'Sales & Purchases', 'Accounting', 'Additional Contact Information', and 'Add Users' (highlighted with a red box). The 'Add Users' tab contains a 'User' field with the value 'testuserbyshashank' and a 'Server' dropdown menu set to 'IndiaPlus', both highlighted with red boxes. An 'Add User' button (highlighted with a red box) is located below these fields. At the bottom, there is a table with columns 'User' and 'Server', and a link 'Add an item'.

Step 2:

\* User inserted into system

Messaging

Sales

Accounting

Warehouse

Human Resources

Reporting

NEWS UPDATES

Nikunj Soni (ROUTES...

routesms

A Messaging & Voice API Company

Sales

Customers

Leads

Opportunities

Quotations

Proforma

Customer Search

After-Sale Services

Helpdesk and Support

Phone Calls

Logged Calls

Products

Products

Configuration

Pricelists

Customers / 01telecom.net

You have gone full screen. [Exit full screen \(F11\)](#)

Edit

Print

Attachment(s)

More

1 / 40

Address

Phone

212 (0) 648 39 56 38

Website

Mobile

Morocco

Fax

Routesms Customer Id

Email

karimjawhar@01telecom.net

Routesms Remark

Title

PARTNER IMPORTED VIA SHEET-LEAD ONLY

Alias

Domain

01telecom.net

Contacts

Internal Notes

Sales & Purchases

Accounting

Additional Contact Information

Add Users

User

Server

IndiaPlus

Add User

User

Server

testuserbyshashank

IndiaPlus

Send a message or Log an internal note

Status: Pending → Confirm

CEO DESK updated document • Mon Aug 10 2015 21:03 • like

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### Step 3: (For Administrator User only)

\* Set count for salesperson.

\* count=5 means this salesperson cannot add users more than 5

The screenshot shows the SphereEdge application interface. The top navigation bar includes links for Messaging, Sales, Project, Accounting, Warehouse, Human Resources, Knowledge, Reporting, and Settings. A dropdown menu is open for 'CEO DESK / SPHERE ...'. The left sidebar contains a tree view with categories like Users, Translations, Custom Configuration, System Settings, Servers, Payments, and Technical. The 'User Setting' option is selected. The main content area is titled 'User Settings / Nikunj Soni' and contains a table with the following data:

Name	Nikunj Soni
User	Nikunj Soni
Rule	Add User Limit
Active	<input checked="" type="checkbox"/>
Count	5

**THANK YOU**