## ADD USERS ACCOUNT FOR ODOO ID (UNDER TESTING)

NOTE 1: This is not final document since feature is under user acceptance testing

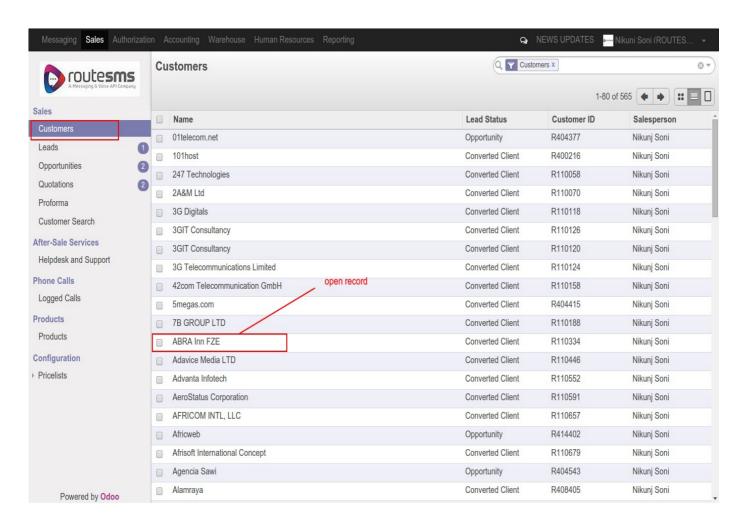
NOTE 2: User account addition/Updation feature will not work if employee strucutre is invalid

NOTE 3: HR department will be responsible for employee structure

NOTE 4: For invalid employee structure contact your HR department

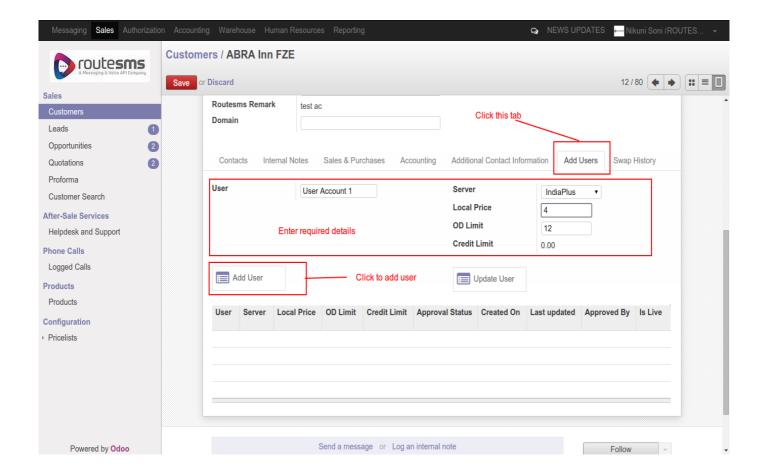
STEP 1:(user account creation)

\* Go to sale-> customer-> open partner/customer record



### STEP 2:

- \* Click on Add User tab. Add user tab is only visible after odoo id created
- \* Enter user name ,select server vice versa
- \* Click "Add User" button to create new user test account for odoo id .



### STEP 3:

- \* User Added in queue.
- \* Request has been sent to your manager for Approval

### Authorization structure:

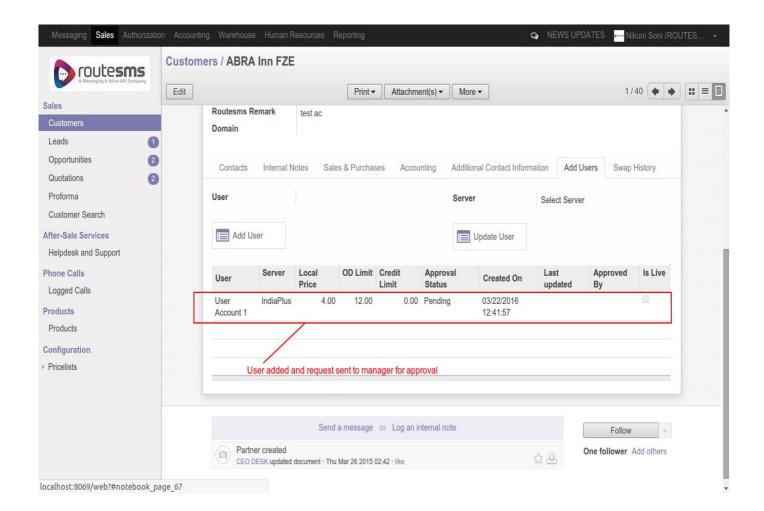
Case 1:BM->TL->DS

OR

Case 2: TL-DS

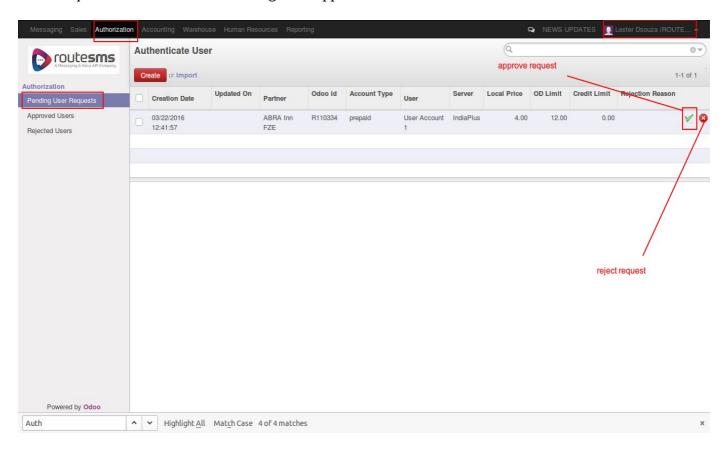
OR

Case 3: DS-CEO



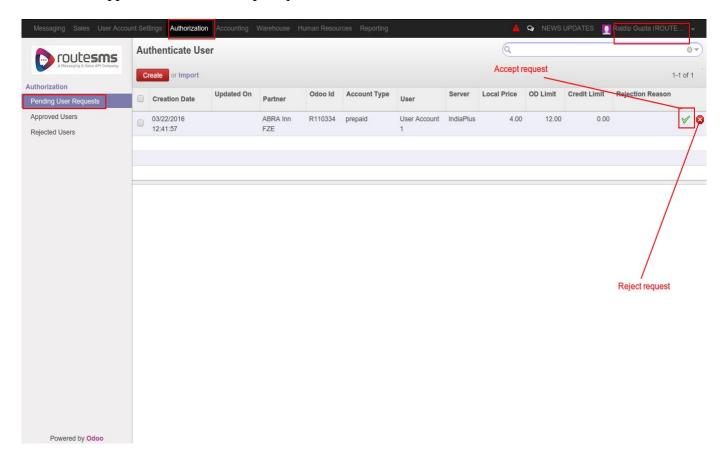
## STEP 4:

- \* TL login to odoo.
- \* Go to "authorization" menu-> click Pending user requests
- \* Click "approve "button to approve user form
- \* Request has been sent TL's Manager for approval



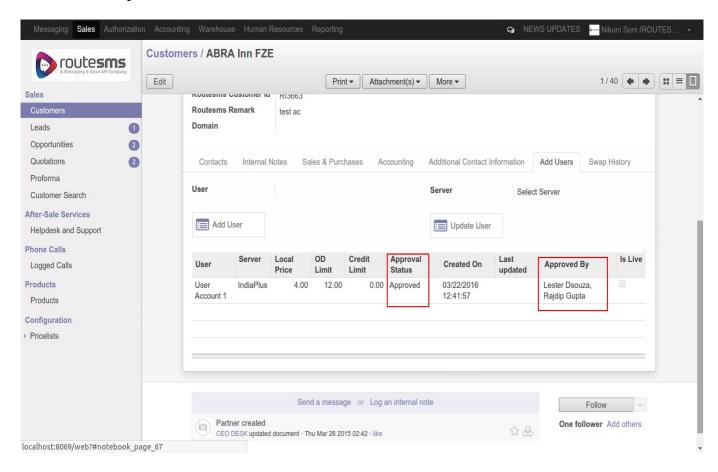
## STEP 5

- \* DS or CEO(in case DS creating user) receives request \* Click "approve" button to accept request



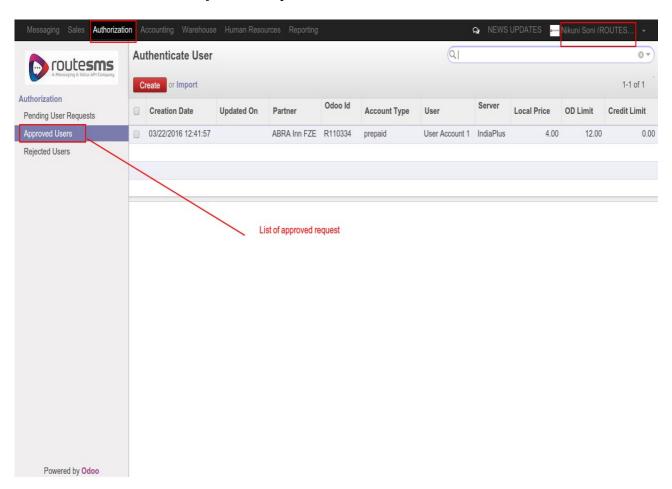
## STEP 6:

\* Go back to partner & check status of user account.



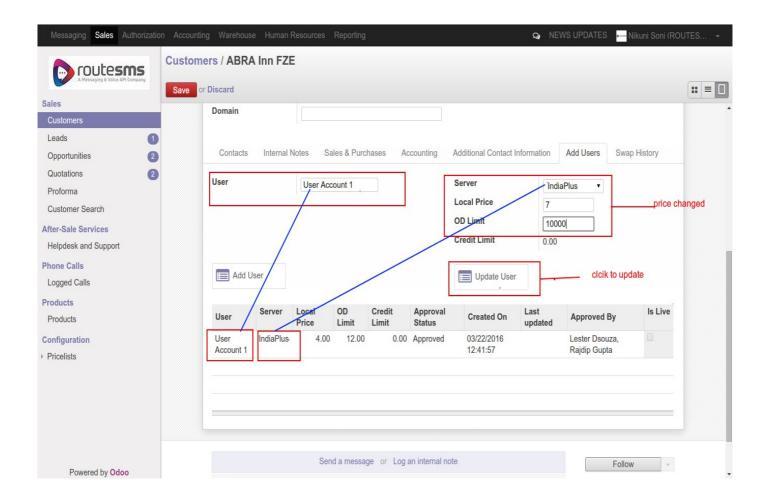
## STEP 7

\* You can also track status of your all requests.



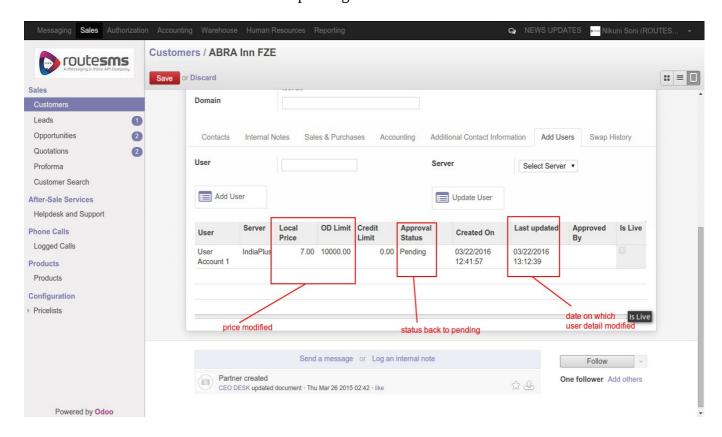
# STEP 8:(Update user account)

- \* Go to partner and enter user detail ,server detail vice versa.
- \* Username, server name information must be equivalent to user account details added before.



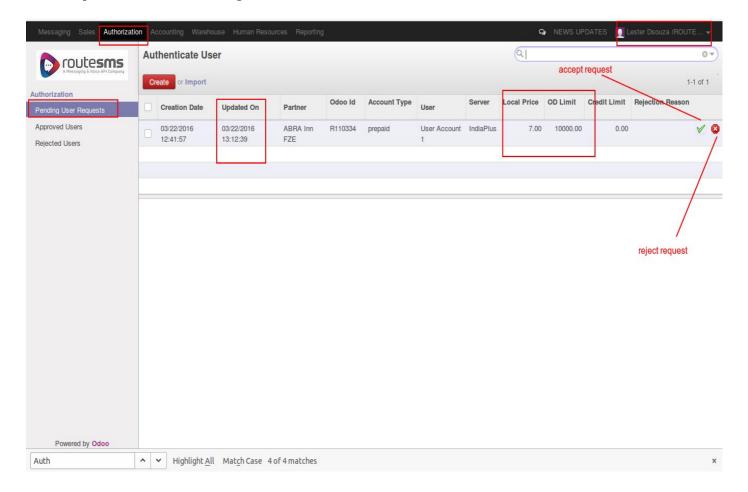
## STEP 9:

- \* Request sent to TL
- \* User detail modified & status back to pending



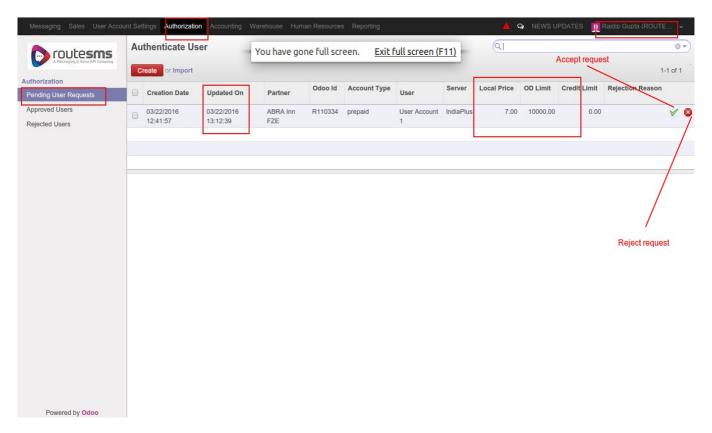
## **STEP 10:**

- \* TL login to odoo account & check pending requests
- \* Click approve to accept request
- \*Request sent to TL"s Manager



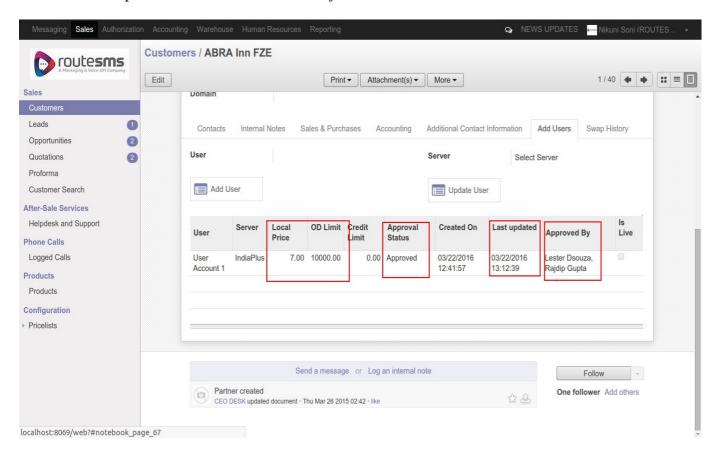
## STEP 11:

\* DS/CEO login to odoo account & check pending request & approves the request



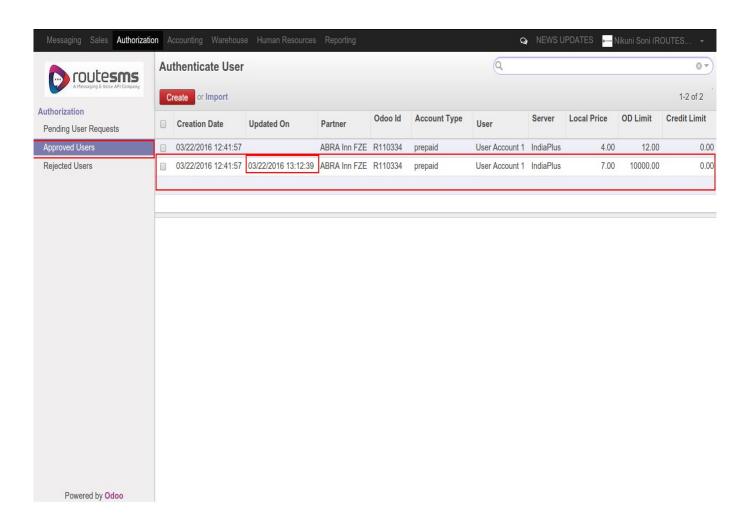
### **STEP 12:**

\* Go back to partner/customer record & verfiy user account details



## **STEP 13:**

\* Track approved request status



# THANK YOU

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