

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 structure 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

The screenshot shows the Odoo CRM interface. The top navigation bar includes 'Messaging', 'Sales', 'Authorization', 'Accounting', 'Warehouse', 'Human Resources', and 'Reporting'. The 'Sales' menu is active. The left sidebar shows the 'Sales' section with 'Customers' highlighted. The main area displays a list of customers. A red box highlights the 'Customers' menu item, and a red arrow points to the 'ABRA Inn FZE' record in the list, labeled 'open record'.

Name	Lead Status	Customer ID	Salesperson
01telecom.net	Opportunity	R404377	Nikunj Soni
101host	Converted Client	R400216	Nikunj Soni
247 Technologies	Converted Client	R110058	Nikunj Soni
2A&M Ltd	Converted Client	R110070	Nikunj Soni
3G Digitals	Converted Client	R110118	Nikunj Soni
3GIT Consultancy	Converted Client	R110126	Nikunj Soni
3GIT Consultancy	Converted Client	R110120	Nikunj Soni
3G Telecommunications Limited	Converted Client	R110124	Nikunj Soni
42com Telecommunication GmbH	Converted Client	R110158	Nikunj Soni
5megas.com	Converted Client	R404415	Nikunj Soni
7B GROUP LTD	Converted Client	R110188	Nikunj Soni
ABRA Inn FZE	Converted Client	R110334	Nikunj Soni
Adavice Media LTD	Converted Client	R110446	Nikunj Soni
Advanta Infotech	Converted Client	R110552	Nikunj Soni
AeroStatus Corporation	Converted Client	R110591	Nikunj Soni
AFRICOM INTL, LLC	Converted Client	R110657	Nikunj Soni
Africweb	Opportunity	R414402	Nikunj Soni
Afrisoft International Concept	Converted Client	R110679	Nikunj Soni
Agencia Sawi	Opportunity	R404543	Nikunj Soni
Alamraya	Converted Client	R408405	Nikunj Soni

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 .

Customers / ABRA Inn FZE

Save or Discard 12 / 80

Routesms Remark: test ac

Domain:

Click this tab

Contacts Internal Notes Sales & Purchases Accounting Additional Contact Information **Add Users** Swap History

User: Server: Local Price: OD Limit: Credit Limit:

Enter required details

Click to add user

User	Server	Local Price	OD Limit	Credit Limit	Approval Status	Created On	Last updated	Approved By	Is Live

Powered by Odoo

Send a message or Log an internal note Follow

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

The screenshot shows the 'routesms' web application interface. The top navigation bar includes 'Messaging', 'Sales', 'Authorization', 'Accounting', 'Warehouse', 'Human Resources', and 'Reporting'. The user is logged in as 'Nikuni Soni (ROUTES...)'. The left sidebar shows a navigation menu with 'Sales' (Customers, Leads, Opportunities, Quotations, Proforma, Customer Search), 'After-Sale Services' (Helpdesk and Support), 'Phone Calls' (Logged Calls), 'Products' (Products), and 'Configuration' (Pricelists).

The main content area is titled 'Customers / ABRA Inn FZE'. It features a 'Routesms Remark' field with the value 'test ac'. Below this, there are tabs for 'Contacts', 'Internal Notes', 'Sales & Purchases', 'Accounting', 'Additional Contact Information', 'Add Users', and 'Swap History'. The 'Add Users' tab is active, showing a table of users.

User	Server	Local Price	OD Limit	Credit Limit	Approval Status	Created On	Last updated	Approved By	Is Live
User Account 1	IndiaPlus	4.00	12.00	0.00	Pending	03/22/2016 12:41:57			<input type="checkbox"/>

A red box highlights the first row of the table. A red arrow points from the 'Pending' status to a red text message: 'User added and request sent to manager for approval'.

At the bottom of the page, there is a 'Send a message or Log an internal note' button. Below this, a notification says 'Partner created' with details 'CEO DESK updated document • Thu Mar 26 2015 02:42 • like'. There is also a 'Follow' button and a notification 'One follower Add others'.

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

The screenshot shows the Odoo interface with the 'Authorization' menu selected. The 'Pending User Requests' sub-menu is active, displaying a table of pending requests. A red box highlights the 'approve request' button above the table. Another red box highlights the 'reject request' button (a red 'X' icon) next to the first row of the table. The first row of the table contains the following data:

	Creation Date	Updated On	Partner	Odoo Id	Account Type	User	Server	Local Price	OD Limit	Credit Limit	Rejection Reason
<input type="checkbox"/>	03/22/2016 12:41:57		ABRA Inn FZE	R110334	prepaid	User Account 1	IndiaPlus	4.00	12.00	0.00	<input checked="" type="checkbox"/>

At the bottom of the screen, there is a search bar with the text 'Auth' and a status bar showing 'Highlight All Match Case 4 of 4 matches'.

STEP 5

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

The screenshot displays the 'Authenticate User' interface in the routesms application. The top navigation bar includes links for Messaging, Sales, User Account Settings, Authorization, Accounting, Warehouse, Human Resources, and Reporting. The 'Authorization' tab is active. On the left sidebar, under 'Authorization', the 'Pending User Requests' section is highlighted. The main content area shows a table with one pending request. A red box highlights the 'Accept request' button above the table. Another red box highlights the 'Reject request' button below the table. The table has columns for Creation Date, Updated On, Partner, Odoo Id, Account Type, User, Server, Local Price, OD Limit, Credit Limit, and Rejection Reason. The first row shows a request created on 03/22/2016 at 12:41:57 for partner ABRA Inn FZE, with Odoo Id R110334, Account Type prepaid, User User Account 1, Server IndiaPlus, Local Price 4.00, OD Limit 12.00, and Credit Limit 0.00. The Rejection Reason column contains a green checkmark icon, indicating the request is approved.

Creation Date	Updated On	Partner	Odoo Id	Account Type	User	Server	Local Price	OD Limit	Credit Limit	Rejection Reason
03/22/2016 12:41:57		ABRA Inn FZE	R110334	prepaid	User Account 1	IndiaPlus	4.00	12.00	0.00	

STEP 6:

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

MessagingSalesAuthorizationAccountingWarehouseHuman ResourcesReporting

NEWS UPDATESNikuni Soni (ROUTES...

routesms

A Messaging to 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 / ABRA Inn FZE

EditPrintAttachment(s)More

1 / 40

Routesms Customer IdR13663

Routesms Remarktest ac

Domain

ContactsInternal NotesSales & PurchasesAccountingAdditional Contact InformationAdd UsersSwap History

UserServerSelect Server

Add UserUpdate User

User	Server	Local Price	OD Limit	Credit Limit	Approval Status	Created On	Last updated	Approved By	Is Live
User Account 1	IndiaPlus	4.00	12.00	0.00	Approved	03/22/2016 12:41:57		Lester Dsouza, Rajdip Gupta	<input type="checkbox"/>

Send a message or Log an internal note

Partner created
CEO DESK updated document • Thu Mar 26 2015 02:42 • like

Follow

One follower Add others

localhost:8069/web?#notebook_page_67

STEP 7

* You can also track status of your all requests.

The screenshot displays the RoutesSMS interface within an Odoo environment. The top navigation bar includes 'Messaging', 'Sales', 'Authorization' (highlighted), 'Accounting', 'Warehouse', 'Human Resources', and 'Reporting'. The user profile 'Nikuni Soni (ROUTES...)' is visible in the top right. The left sidebar shows the 'Authorization' menu with 'Approved Users' selected. The main content area is titled 'Authenticate User' and features a search bar and buttons for 'Create' and 'Import'. Below this is a table with the following data:

<input type="checkbox"/>	Creation Date	Updated On	Partner	Odoo Id	Account Type	User	Server	Local Price	OD Limit	Credit Limit
<input type="checkbox"/>	03/22/2016 12:41:57		ABRA Inn FZE	R110334	prepaid	User Account 1	IndiaPlus	4.00	12.00	0.00

A red arrow points from the 'Approved Users' menu item to the table, with the text 'List of approved request' next to it. The footer indicates 'Powered by Odoo'.

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.

The screenshot displays the 'routesms' web application interface. The top navigation bar includes 'Messaging', 'Sales', 'Authorization', 'Accounting', 'Warehouse', 'Human Resources', and 'Reporting'. The user is logged in as 'Nikuni Soni (ROUTES...)'. The left sidebar shows a menu with 'Sales' (Customers, Leads, Opportunities, Quotations, Proforma, Customer Search) and 'After-Sale Services' (Helpdesk and Support, Phone Calls, Logged Calls, Products, Configuration, Pricelists). The main content area is titled 'Customers / ABRA Inn FZE' and features a 'Save or Discard' button. Below this, there are tabs for 'Contacts', 'Internal Notes', 'Sales & Purchases', 'Accounting', 'Additional Contact Information', 'Add Users', and 'Swap History'. The 'Add Users' tab is active, showing a form to update a user. The form includes fields for 'User' (set to 'User Account 1'), 'Server' (set to 'IndiaPlus'), 'Local Price' (set to '7'), 'OD Limit' (set to '10000'), and 'Credit Limit' (set to '0.00'). A red box highlights the 'Local Price' field with the annotation 'price changed'. A red box highlights the 'Update User' button with the annotation 'click to update'. Below the form is a table with columns: 'User', 'Server', 'Local Price', 'OD Limit', 'Credit Limit', 'Approval Status', 'Created On', 'Last updated', 'Approved By', and 'Is Live'. The table contains one row for 'User Account 1' with the following values: 'IndiaPlus', '4.00', '12.00', '0.00', 'Approved', '03/22/2016 12:41:57', 'Lester Dsouza, Rajdip Gupta', and 'Is Live' (checkbox). The bottom of the page shows a 'Send a message or Log an internal note' button and a 'Follow' button.

Domain:

Contacts Internal Notes Sales & Purchases Accounting Additional Contact Information Add Users Swap History

User:

Server:

Local Price: price changed

OD Limit:

Credit Limit:

Add User Update User click to update

User	Server	Local Price	OD Limit	Credit Limit	Approval Status	Created On	Last updated	Approved By	Is Live
User Account 1	IndiaPlus	4.00	12.00	0.00	Approved	03/22/2016 12:41:57		Lester Dsouza, Rajdip Gupta	<input type="checkbox"/>

Send a message or Log an internal note Follow

STEP 9:

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

routesms
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Sales Customers Leads Opportunities Quotations Proforma Customer Search After-Sale Services Helpdesk and Support Phone Calls Logged Calls Products Configuration Pricelists

Customers / ABRA Inn FZE

Save or Discard

Domain

Contacts Internal Notes Sales & Purchases Accounting Additional Contact Information Add Users Swap History

User Server Select Server

Add User Update User

User	Server	Local Price	OD Limit	Credit Limit	Approval Status	Created On	Last updated	Approved By	Is Live
User Account 1	IndiaPlus	7.00	10000.00	0.00	Pending	03/22/2016 12:41:57	03/22/2016 13:12:39		<input type="checkbox"/>

price modified status back to pending date on which user detail modified

Is Live

Send a message or Log an internal note

Partner created
CEO DESK updated document - Thu Mar 26 2015 02:42 - like

Follow

One follower Add others

Powered by Odoo

STEP 10:

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

routesms
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Authorization

Pending User Requests

Approved Users

Rejected Users

Authenticate User

Create or Import

1-1 of 1

	Creation Date	Updated On	Partner	Odoo Id	Account Type	User	Server	Local Price	OD Limit	Credit Limit	Rejection Reason
<input type="checkbox"/>	03/22/2016 12:41:57	03/22/2016 13:12:39	ABRA Inn FZE	R110334	prepaid	User Account 1	IndiaPlus	7.00	10000.00	0.00	<input checked="" type="checkbox"/> <input type="checkbox"/>

accept request

reject request

Powered by Odoo

Auth ^ v Highlight All Match Case 4 of 4 matches x

STEP 11:

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

The screenshot shows the 'Authenticate User' screen in the routesms Odoo interface. The top navigation bar includes 'Messaging', 'Sales', 'User Account Settings', 'Authorization' (highlighted), 'Accounting', 'Warehouse', 'Human Resources', and 'Reporting'. The left sidebar shows 'Authorization' with 'Pending User Requests' selected. The main table displays a list of user requests with columns: Creation Date, Updated On, Partner, Odoo Id, Account Type, User, Server, Local Price, OD Limit, Credit Limit, and Rejection Reason. A red box highlights the 'Updated On' column, and another red box highlights the 'Local Price', 'OD Limit', and 'Credit Limit' columns. A red arrow points to the 'Accept request' button, and another red arrow points to the 'Reject request' button.

	Creation Date	Updated On	Partner	Odoo Id	Account Type	User	Server	Local Price	OD Limit	Credit Limit	Rejection Reason
<input type="checkbox"/>	03/22/2016 12:41:57	03/22/2016 13:12:39	ABRA Inn FZE	R110334	prepaid	User Account 1	IndiaPlus	7.00	10000.00	0.00	<input checked="" type="checkbox"/>

STEP 12:

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

Messaging

Sales

Authorization

Accounting

Warehouse

Human Resources

Reporting

NEWS UPDATES

Nikuni 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 / ABRA Inn FZE

Edit

Print

Attachment(s)

More

1 / 40

Domain

Contacts

Internal Notes

Sales & Purchases

Accounting

Additional Contact Information

Add Users

Swap History

User

Server

Select Server

Add User

Update User

User	Server	Local Price	OD Limit	Credit Limit	Approval Status	Created On	Last updated	Approved By	Is Live
User Account 1	IndiaPlus	7.00	10000.00	0.00	Approved	03/22/2016 12:41:57	03/22/2016 13:12:39	Lester Dsouza, Rajdip Gupta	<input type="checkbox"/>

Send a message or Log an internal note

Follow

Partner created

CEO DESK updated document • Thu Mar 26 2015 02:42 • like

One follower Add others


localhost:8069/web?#notebook_page_67

STEP 13:

* Track approved request status

MessagingSalesAuthorizationAccountingWarehouseHuman ResourcesReporting

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Authorization

Pending User Requests

Approved Users

Rejected Users

Powered by Odoo

Authenticate User

Create or Import

1-2 of 2

	Creation Date	Updated On	Partner	Odoo Id	Account Type	User	Server	Local Price	OD Limit	Credit Limit
<input type="checkbox"/>	03/22/2016 12:41:57		ABRA Inn FZE	R110334	prepaid	User Account 1	IndiaPlus	4.00	12.00	0.00
<input type="checkbox"/>	03/22/2016 12:41:57	03/22/2016 13:12:39	ABRA Inn FZE	R110334	prepaid	User Account 1	IndiaPlus	7.00	10000.00	0.00

THANK YOU

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