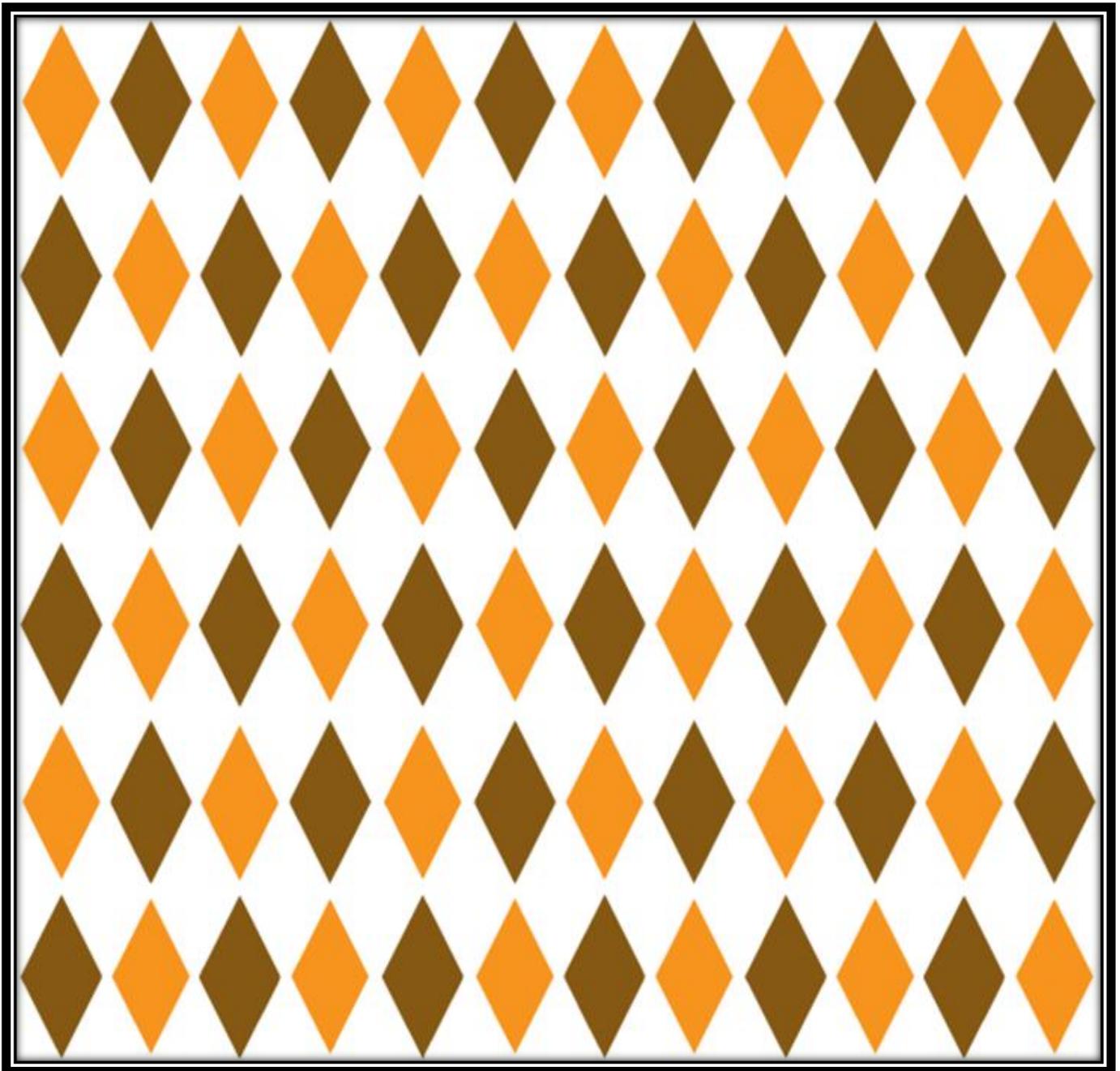


OpenERP **ADD USER TO SALES ORDER MODULE** ◆

Manual for Version 1.0

The **ADD USER TO SALES ORDER MODULE** is an addon module for OpenERP, the very well-known integrated enterprise resource planning (ERP) software that is manufactured by OpenERP s.a.

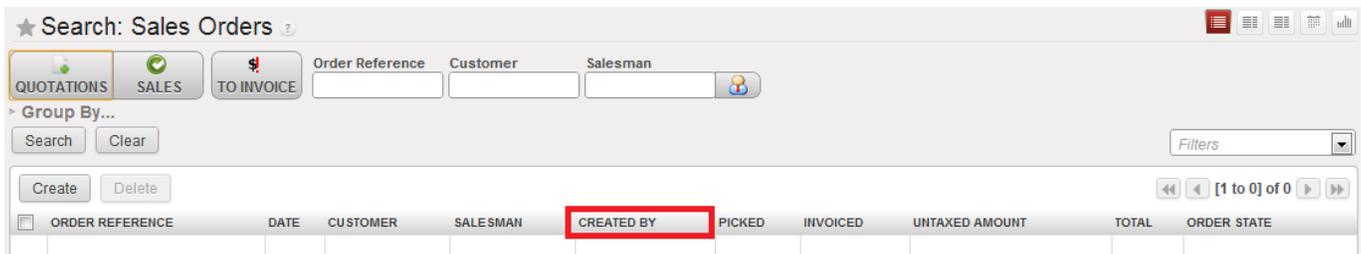


1. Introduction

This module exposes information about the user who created a sales order. This is useful in cases where other users may have questions about the order and want to track down who entered the order into the system.

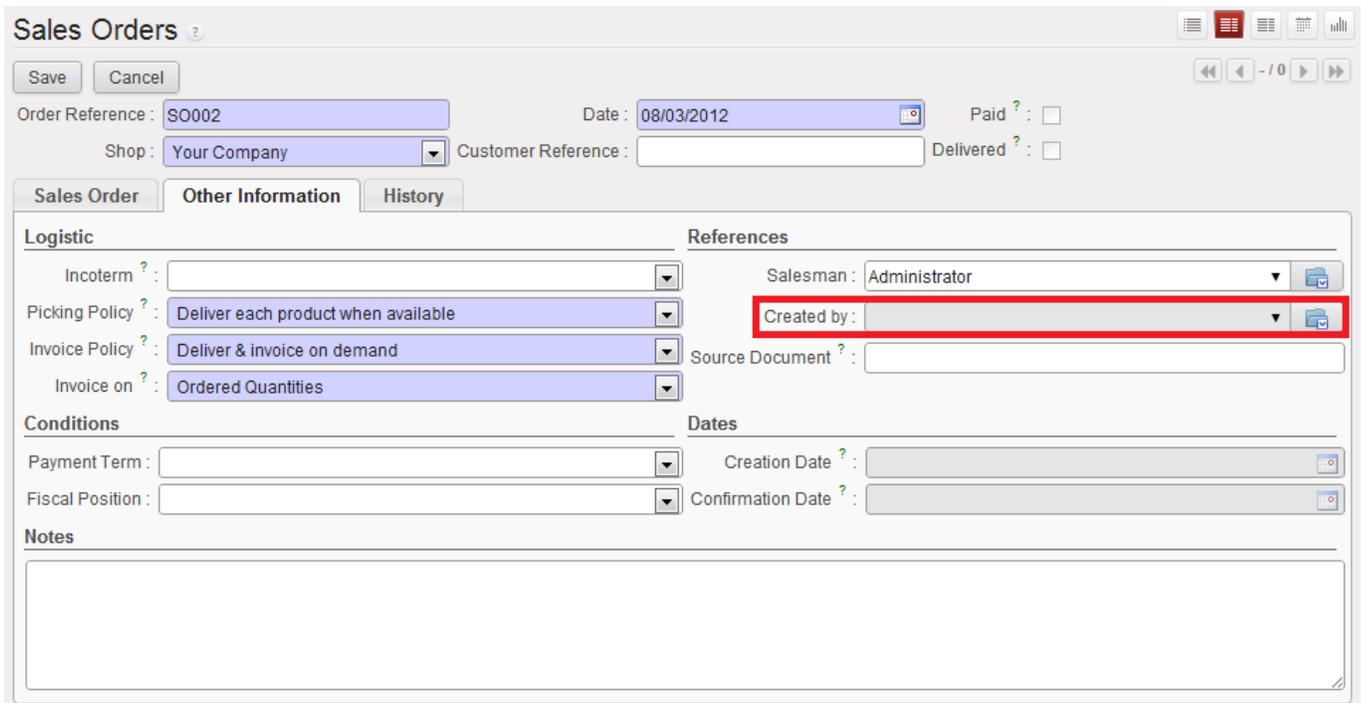
A new field *Created By* is added to both the tree and form views of Sales Orders.

Tree View:



The screenshot shows the 'Sales Orders' tree view. At the top, there is a search bar with the text 'Search: Sales Orders'. Below it are buttons for 'QUOTATIONS', 'SALES', and 'TO INVOICE', along with input fields for 'Order Reference', 'Customer', and 'Salesman'. A 'Group By...' dropdown is set to 'Search', and there are 'Create' and 'Delete' buttons. The table below has columns: ORDER REFERENCE, DATE, CUSTOMER, SALESMAN, **CREATED BY** (highlighted with a red box), PICKED, INVOICED, UNTAXED AMOUNT, TOTAL, and ORDER STATE. The table is currently empty, showing '[1 to 0] of 0' records.

Form View:



The screenshot shows the 'Sales Orders' form view. At the top, there are 'Save' and 'Cancel' buttons. The form contains several fields: 'Order Reference' (SO002), 'Date' (08/03/2012), 'Paid' (checkbox), 'Shop' (Your Company), 'Customer Reference', and 'Delivered' (checkbox). Below these are tabs for 'Sales Order', 'Other Information', and 'History'. The 'Logistic' section includes 'Incoterm', 'Picking Policy' (Deliver each product when available), 'Invoice Policy' (Deliver & invoice on demand), and 'Invoice on' (Ordered Quantities). The 'References' section includes 'Salesman' (Administrator) and 'Created by' (highlighted with a red box). The 'Conditions' section includes 'Payment Term' and 'Fiscal Position'. The 'Dates' section includes 'Creation Date' and 'Confirmation Date'. At the bottom, there is a 'Notes' section with a large text area.

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2. Version

This module was written and tested for OpenERP 6.1-1 and works equally well on Windows and Linux distributions. This version was released on August 15th, 2012.

3. Installation

This module installs as a standard OpenERP module.

Step One: Download, unzip and copy the module folder and files to one of the add-ons directories.

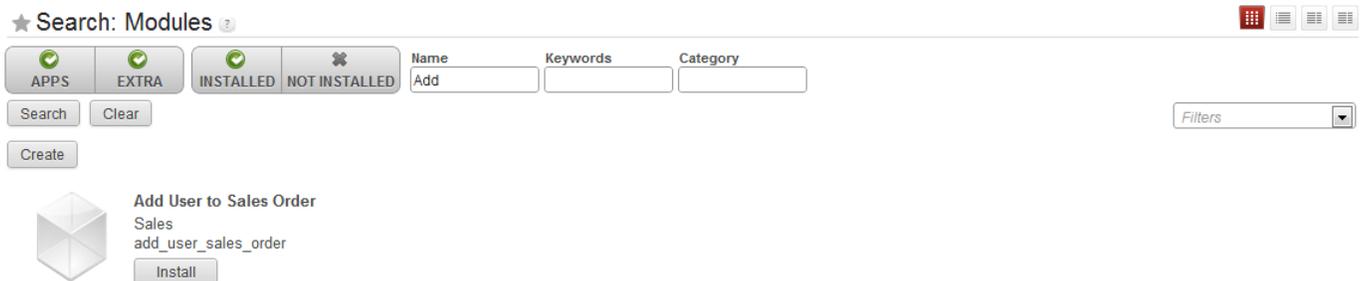
Step Two: Get OpenERP to recognize it by selecting the following menu sequence:

Settings -> Modules -> Update Modules List

Step Three: find the module by selecting the following menu sequence:

Settings -> Modules -> Modules

Enter the search term *Add* in the **Name** box and click **Search**.



★ Search: Modules 

APPS EXTRA INSTALLED NOT INSTALLED

Name Keywords Category

Add

Search Clear Filters

Create

 Add User to Sales Order
Sales
add_user_sales_order
Install

Step Four: Click the **Install** button.

4. Support and Feedback

Please use Launchpad to send messages to the development team.

<https://answers.launchpad.net/openerp-add-user-sales-order/+addquestion>



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