Technical Report – Customer Module with Social Networks Integration

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Overview

This report presents a summary of the functionalities developed for a custom module in Odoo 18, designed to extend the capabilities of the customer management system (`res.partner`). The module introduces support for social media links, enables the identification of complete customer profiles, and adds both backend and frontend improvements to enrich the user experience and accessibility of customer data.

1 Implemented Features

1. **Social media fields added to the customer model**
   Three new fields were added to the existing `res.partner` model to store URLs to the customer's social media profiles:

   - Facebook
   - LinkedIn
   - Twitter

   These fields allow users to centralize relevant online presence data directly in the customer form.

2. **New tab for social networks in the form view**
   To improve organization and readability, a new tab was added to the customer form view. This tab displays the three social media fields with corresponding visual icons to distinguish each platform. The design is intuitive and follows Odoo's standard UI conventions to ensure ease of use.

3. **Computed field to evaluate profile completeness**
   A new computed Boolean field named `is_profile_complete` was introduced. This field automatically determines whether the customer has filled all three social media fields. If all fields contain valid URLs, the profile is marked as complete. The field updates dynamically whenever one of the relevant fields is modified.

4. **Visual marker for complete profiles**
   When a customer has a complete profile, a visual indicator is displayed across all views (form, list, kanban, etc.). This indicator serves as a quick reference for users

to identify which customers have fully completed profiles, improving workflow and data consistency.

5. **Filter for incomplete profiles**
   To facilitate data management, a new filter was added to the customer list view. This filter allows users to display only the customers whose profiles are incomplete (i.e., who are missing one or more social media links). This functionality is useful for data entry audits or when preparing outreach campaigns that require full contact information.

6. **Public customer profile webpage**
   The module adds a publicly accessible webpage for each customer. This page displays basic information about the customer, including their name, description, and links to their social media profiles. It provides a way to publicly showcase customer profiles, which may be useful for business directories or portfolio-style listings.

7. **Search functionality on the public website**
   The public site includes a search bar that enables filtering customer profiles based on their presence on specific social media platforms. For example, users can search for customers who have a LinkedIn profile, or those who are only on Twitter. This enhances navigation and targeting when browsing through the public listings.

8. **Automated testing included**
   The module includes automated unit tests that verify the correct behavior of each feature. These tests cover field visibility, the correctness of the computed field logic, filter behavior, and basic access to the website routes. Testing was done within the context of Odoo 18 using the built-in testing framework.

2   Conclusion

This custom module extends the standard customer management features in Odoo by integrating social media tracking, improving user interface organization, and offering a public-facing web presence for customers. The features support better data completeness, help users visually track the status of customer profiles, and make the CRM module more dynamic and informative. All development was carried out using best practices in Odoo module architecture, including views, models, computed fields, filters, website controllers, and automated testing.