

## 1 Structure

Repository	The <b>attooh!</b> root repository
attooh_sms	the short messaging service module
crm_attooh	the short messaging service module
crm_credit_report	the short messaging service module
mail_debrand	the short messaging service module
odoo_debrand_11	the short messaging service module
payment_mygate	the short messaging service module
sms_myframe	the short messaging service module

## 2 Add Ons

**You Tube** channel.

### 2.1 models

```
from odoo import models, fields, api

class Course(models.Model):
    _name = 'openacademy.course'
    _description = "OpenAcademy Courses"

    name = fields.Char(string="Title", required=True)
    description = fields.Text()
```

Models use three name fields `_name` to identify the table, `name` to identify the model and `_rec_name` as a display name for the model.

### 2.2 Manifest

**manifest**

### 2.3 Web

**web Website Theme**

## 3 Creating new modules

The following command can be used to create a new module.

```
odoo-bin scaffold <module name> <where to put it>
```

## 4 User Access and Control

User access rights and permissions are stored in the security files under each package. These are either hard coded into suchfiles or are added within the database I'm not sure how syncing happens just yet between these sources.

## 5 Schema

Presently there is no record of the Odoo Schema, this needs to be pulled from the database and included here.

## 6 Content Resource Management:attooh!

### 6.1 Work Flow

When a client first contacts one of the service providers they may or may not know what it is exactly that they want. Those that do not know what they require in terms of financial services are passed through an initial *exploratory process*, illustrated in figure 1 below. During this process one or more **implicit pipeline** are initiated. Those that know what they require when they contact a service provider are passed directly to an **explicit pipeline**.

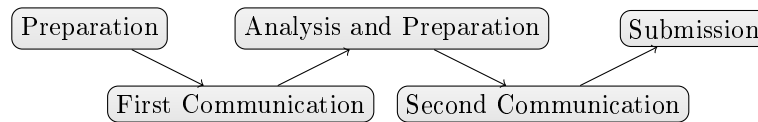


Figure 1: The *exploratory process* for clients that are unsure of the facilities they require

This work flow is repeated during the *review process* a year down the line, where it serves to update the client information and offer them additional services should they be required. Necessarily the *review process* is more streamlined than the *exploratory process* as most of the clients details are already recorded.

### 6.2 Implicit Pipelines

During the processing of an application the following *implicit* product pipelines (See figure 2) are followed to ensure that the appropriate documentation is collected and eventually submitted to the respective financial institution providing the selected product.

### 6.3 Explicit Pipelines

The clients who know exactly what they require may skip the *exploratory process* described above and are simply short circuited to the desired product (See

figure 3) such that their needs may be serviced directly. The following pipelines accomodate this eventuality.

## 6.4 Services

**NOTE 1 :** Within the code base the following are listed as *services* rather than as *pipelines* or as the *process*, either I'm crossing my wires or there is a naming mismatch here

The `crm_attooh>data>crm.service.type.csv` file lists a set of services that the respective financial providers offer. This is accessed via `CRM>Configuration>Service Type (Under Supplied Services)`

Table 1: List of services (internally this is referred to as the service types)

Service	Odoo ID
Financial Planning	crm_attooh.prelim_fin_planning
Risk	crm_attooh.risk
Investment	crm_attooh.investment
Wills	crm_attooh.wills
Business Planning	crm_attooh.business_planning
Short Term	crm_attooh.short_term
Health	crm_attooh.health
Trusts	crm_attooh.trusts
Geneal Power of Attorney	crm_attooh.gpoa
Review	crm_attooh.review
Sec 14 Planning	crm_attooh.section14

Each service is provided by a set of Piple

### 6.4.1 Pipelines

**NOTE 2 :** Within the code base the following are listed as *activities* rather than as *pipelines*, *pipelines* seems to be the common terminology within the company and should be preferred

The `crm_attooh>data>crm.service.type.activity.csv` file contains the current pipelines made avilable within the CRM interface. These are to be extracted from `crm.service.type` tab of the `XLR8 WorkFlows v M.m` file on Isabe's Google drive. This file is to be shared with all relevant parties working on the pipelines. Other tabs in that file appear to be irrelevant.

```
crm_attooh>models>crm_lead.py
crm_attooh>models>res_partner.py
crm_attooh>views>crm_views.xml
```

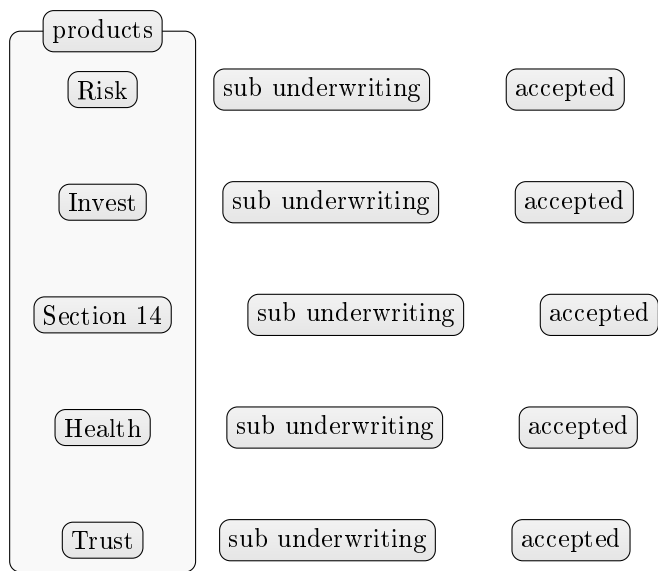


Figure 2: Explicit Pipelines

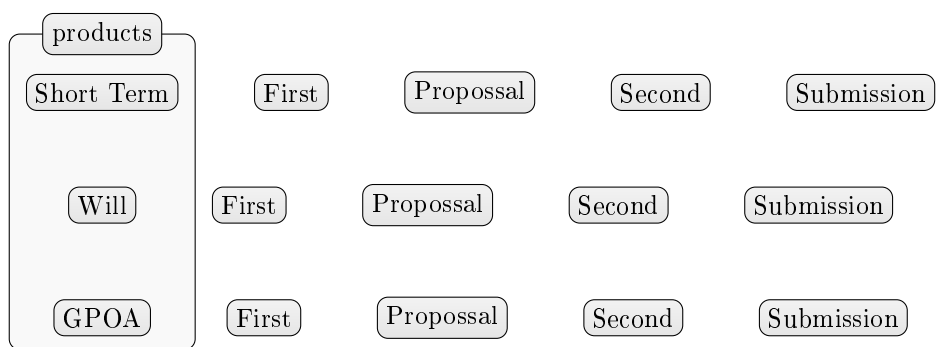


Figure 3: Implicit Pipelines

Odoo ID	Service
A1.1	Capture & Qualify leads
A1.2	Schedule Appointment
A1.3	Thank referring party
A1.4	Personal info to fill online/
A1.5	Draw schedules from Astut
A1.6	Reminder Confirm meeting
A1.7	Prepare for client meeting
A2.1	Define client needs - Person
A2.2	Send decision and thank yo
A3	Analysis and Proposal
A3.1	Send client fee and mandat
A3.2	Client accepts or rejects. I
A3.3	Send out fee agreement inv
A3.4	Set up second appointment
A3.5	Capture Personal & FNA i
A3.6	Prepare product quotes
A4.1	Confirm appointment
A4.2	Advisor meets client to clo
A4.3	Based on close - thank you
RP1.1	Schedule Appointment (Ye
RP1.2	Send email invite with age
RP1.3	Request updated informait
RP1.4	Draw schedules from Astut
RP1.5	Revise Financial plan from
RP1.6	Reminder Confirm meeting
RP1.7	Prepare for client meeting
RP2.1	Review client needs, Person
RP3.1	Set up Second Appointmer
RP3.2	Update Personal & FNA in
RP3.3	Prepare product alteration
RP4.1	Confirm appointment
RP4.2	Advisor meet client to clos
RP4.3	Based on close (Yes/ No) t
R1.1	Quality check apps
R1.2	Note for replacement & file
R1.3	Collect documentation from
R1.4	Submit documents and app
R1.5	Email "next steps" email t
R1.6	Update production book
R1.7	Check, capture and action
R1.8	Insert date and time of me
R1.9	SMS medical app reminder
R1.10	Additional requirements (y

R1.11	*Outcome: Accepted, COL
R2.1	Confirm documents, terms
R2.2	If correct - "thank you" ma
R2.3	Reminder on replacement
R2.4	If replacement - Submit ca
R2.5	When cancelled - Confirm
R2.6	Compliance upload and ma
I1.1	Quality check apps
I1.2	Note for replacement & file
I1.4	Submit documents and app
I1.5	Update production book
I1.6	Confirm transfer of funds t
I1.7	Send confirmation of invest
I2.1	Confirm documents, terms
I2.2	If correct - "thank you" ma
I2.3	Reminder on replacement
I2.4	If replacement - Submit ca
I2.5	When cancelled - Confirm
I2.6	Compliance upload and ma
S1.6	Submit documents to trans
S1.7	Confirm transferring comp
S1.8	Confirm receiving company
S1.9	Confirms transferring comp
S1.10	Confirms transferring comp
S1.11	Confirm receiving company
S1.12	Confirm Funds invested by
S1.13	Update production book
S1.14	Confirm transfer of funds t
S1.15	Send confirmation of trans
S2.1	Confirm documents, terms
I2.2	If correct - "thank you" ma
I2.3	Reminder on replacement
I2.4	If replacement - Submit ca
I2.5	When cancelled - Confirm
I2.6	Compliance upload and ma
W1.1	Collect relevant informatio
W2.1a	Refer complex will to assoc
W2.2a	Send Will Specialist invoic
W2.3a	Send confirmation of paym
W2.1b	Generates simple will from
W3.1	Will document to client for
W3.2	Client signs off two hard co
W4.1	Scan and save copy of the
W4.2	Process original for safekee
B1.1	Quality check vendor app
B1.2	Note for replacement (yes/

B1.3	Collect documentation from
B1.4	Submit documents and app
B1.5	Email "next steps" email t
B1.6	Update production book
B1.7	Check, capture and action
B1.8	Insert date and time of me
B1.9	SMS medical app reminder
B1.10	Additional requirements (y
B1.11	*Outcome: Accepted, COL
B2.1	Confirm documents, terms
B2.2	If correct - "thank you" ma
B2.3	Set up meeting to get cont
B2.4	Draft, email to client and p
B2.5	Reminder on replacement
B2.6	If replacement - Submit ca
B2.7	When cancelled - Confirm
B2.8	Compliance upload and ma
S1.1	Client requests cover
S1.2	Client provides current cov
S2.1	Prepare quotes/ alternativ
S2.2	Propose add-ons
S3.1	Present proposal and quot
S3.2	Fill in vendor app
S3.3	Collect documentation from
S4.1	Submit documents and app
S4.2	Manage COL
S4.3	Manage NTU
S4.4	Receive confirmation from
S5.1	Send confirmation client
S5.2	Provide access to complian
H1.1	Client acceptance of propo
H1.2	Fill product vendor apps I
H1.3	Collect documentation from
H1.4	Scan to file
H2.1	Submit documents and app
H2.2	Manage COL
H2.3	Manage NTU
H2.4	Receive confirmation from
H3.1	Complete RoA
H3.2	Send confirmation to client
H3.3	Provide access to complian
T1.1	Fill trust specialist applica
T1.2	Collect documentation from
T1.3	Scan to file
T2.1	Submit documents and app
T2.2	Trust specialist invoice pro

T2.3	Receive payment confirmation
T2.4	Receive prepared documents
T2.5	Client to sign two hard copies
T2.6	Trust documents submitted
T3.1	Send confirmation to client
T3.2	Save scanned stamped trust
T3.3	Send originally stamped trust
G1.1	Complete first and second
G2.1	Generate GPOA from template
G3.1	GPOA document provided
G3.2	Client signs off one copy of
G4.1	Scan and save copy of the
dtldb@csvCRMServiceTypeActivitiesesstagelocation of the GPOA to client file	crm_attooh.stage_compli

## 6.5 Manifest

The following data files are referenced by the manifest.

`data\crm.service.type.csv` This contains all of the systems **Activities**

## 6.6 Groups

The permission groups were not documented anywhere, scanning the `crm_attooh\data\ir.model.access.csv` file shows the following groups are presently used.

**NOTE 3** : review group permissions in *crm\_attooh*

**group\_financial\_services\_manager** Users in this group are considered financial manager and may edit/manipulate model entries

**group\_financial\_services\_user** Users in this group are considered financial users and may edit/manipulate model entries

## 6.7 Security Permissions

Access Entity Status	<b>CRUD</b>
<code>access_entity_status</code>	<code>model_entity_status</code>
	<code>group_financial_services_user</code>

Undefined Value

Access Partner Income	<b>CRUD</b>
<code>access_partner_income</code>	<code>model_partner_income</code>
	<code>group_financial_services_user</code>

Undefined Value



Access Partner Deduction <code>access_partner_deduction</code>	<b>CRUD</b> <code>model_partner_deduction</code> <code>group_financial_services_user</code>
Undefined Value	
Access Partner Expense <code>access_partner_expense</code>	<b>CRUD</b> <code>model_partner_expense</code> <code>group_financial_services_user</code>
Undefined Value	
Access Debt Obligations <code>access_debt_obligations</code>	<b>CRUD</b> <code>model_debt_obligations</code> <code>group_financial_services_user</code>
Undefined Value	
Access Partner Asset <code>access_partner_asset</code>	<b>CRUD</b> <code>model_partner_asset</code> <code>group_financial_services_user</code>
Undefined Value	
Access Document Type <code>access_document_type</code>	<b>CRUD</b> <code>model_document_type</code> <code>group_financial_services_user</code>
Undefined Value	
Access Res Partner <code>access_res_partner</code>	<b>CRUD</b> <code>model_res_partner</code> <code>group_financial_services_user</code>
Undefined Value	
Access Ir Attachment <code>access_ir_attachment</code>	<b>CRUD</b> <code>model_ir_attachment</code> <code>group_financial_services_user</code>
Undefined Value	
Access Helpdesk Ticket Type <code>access_helpdesk_ticket_type</code>	<b>CRUD</b> <code>helpdesk.model_helpdesk_ticket_type</code> <code>group_financial_services_user</code>
Undefined Value	
Access Helpdesk Stage <code>access_helpdesk_stage</code>	<b>CRUD</b> <code>helpdesk.model_helpdesk_stage</code> <code>group_financial_services_user</code>
Undefined Value	

Access Mail Message <code>access_mail_message</code>	<b>CRUD</b> <code>mail.model_mail_message</code> <code>group_financial_services_user</code>
Undefined Value	
Access Ticket Type Activity <code>access_ticket_type_activity</code>	<b>CRUD</b> <code>model_ticket_type_activity</code> <code>group_financial_services_user</code>
Undefined Value	
Access Employee Roles <code>access_employee_roles</code>	<b>CRUD</b> <code>model_employee_roles</code> <code>base.group_user</code>
Undefined Value	
Access Employee Roles <code>access_employee_roles</code>	<b>CRUD</b> <code>model_employee_roles</code> <code>group_financial_services_user</code>
Undefined Value	
Access User Employee Roles <code>access_user_employee_roles</code>	<b>CRUD</b> <code>model_user_employee_roles</code>
Undefined Value	
Access Manager Employee Roles <code>manager_user_employee_roles</code>	<b>CRUD</b> <code>model_user_employee_roles</code> <code>group_financial_services_manager</code>
Undefined Value	
Access Crm Type <code>access_crm_type</code>	<b>CRUD</b> <code>model_crm_service_type</code> <code>group_financial_services_manager</code>
Undefined Value	
Access Crm Type <code>access_crm_type</code>	<b>CRUD</b> <code>model_crm_service_type</code> <code>group_financial_services_user</code>
Undefined Value	
Access Financial Product <code>access_financial_product</code>	<b>CRUD</b> <code>model_financial_product</code> <code>group_financial_services_user</code>
Undefined Value	

Access Financial Product Manager access_financial_product_manager	model_financial_product group_financial_services_manager	CRUD
Undefined Value		
Access Crm Service Activity access_crm_service_activity	model_crm_service_activity group_financial_services_user	CRUD
Undefined Value		
Access Crm Service Activity Manager access_crm_service_activity_manager	model_crm_service_activity group_financial_services_manager	CRUD
Undefined Value		
Access Crm Service Type Activity access_crm_service_type_activity	model_crm_service_type_activity group_financial_services_user	CRUD
Undefined Value		
Access Crm Service Type Activity Manager access_crm_service_type_activity_manager	model_crm_service_type_activity group_financial_services_manager	CRUD
Undefined Value		
Access Crm Contacts access_crm_contacts	model_partner_relationship group_financial_services_user	CRUD
Undefined Value		
Access Crm Contacts access_crm_contacts	model_partner_relationship group_financial_services_manager	CRUD
Undefined Value		
Model Partner Relationship dtldb@csvCrmAttoohohpermUnlink_contacts	group_financial_services_manager	CRUD
Undefined Value		1

## 7 Attooh (Short Message Service)

### 7.1 Security Permissions

Access Sms Recipients	
<code>access_sms_recipients</code>	<code>model_sms_recipients</code>

Undefined Value

Access Sms List	
<code>access_sms_list</code>	<code>model_sms_list</code>

Undefined Value

Access Mass Sms	
<code>access_mass_sms</code>	<code>model_mass_sms</code>

Undefined Value

Access Sms Participant	
<code>access_sms_participant</code>	<code>model_sms_participant</code>

Undefined Value

Access Sms Shortcode	
<code>access_sms_shortcode</code>	<code>model_sms_shortcode</code>


Undefined Value

## 8 Odoo Debranding

### 8.1 Security Permissions

Odoo Debrand.odoo Debrand	
<code>access_odoo_debrand_odoo_debrand</code>	<code>model_odoo_debrand_odoo_debrand</code>

This is a permission for Odoo Debranding

Model Odoo Debrand Odoo Debrand	
<code>dtldb@csv0dooBrandingngpermUnlinkodoo_debrand.odoo_debrand</code>	

1

Undefined Value

## 8.2 Errors

### 8.2.1 Access

**CRM Service Type** Within the interface I got the following error In this case

entries were added under `atooh_crm>security>ir.model.access.csv`. the ID and Name are specified according to a tag-like convention, the model refers to the database model/table. Then the groups are specified elsewhere per some xml file. Permissions are simply flags and are set according to who may access the view/model.

**Financial Product** Within the interface I got the following error

Further information was made available for this when one commented out the label `is_financial_advisor` as below.

```
Exception: Module loading crm_attooh failed: file crm_attooh\security\ir.model.a
No matching record found for external id 'crm.service.type' in field 'Object'
No matching record found for external id 'services_manager' in field 'Group'
No matching record found for external id 'crm.service.type' in field 'Object'
No matching record found for external id 'services_user' in field 'Group'
Missing required value for the field 'Object' (model_id)
Missing required value for the field 'Object' (model_id)
```

It seems this is setup within `crm_attooh>security>user_groups.xml`.

### 8.2.2 Upgrade

when selecting an application within the user interface one or more errors may occur. These are usually shown as Python stack traces.

#### Validation Errors

```
odoo.exceptions.ValidationError: ('Invalid view res.users.groups definition in c
res.users.groups is the Odoo groups table under odoo>addons>base>models>
res_users.py. The fix in this case was to comment out <label of="is_financial_advisor"/>
under crm>_attooh>views>res>_users.xml, quite unreated but resumably
the model/view cascade affects why this is here.
```

