
LINENFINDER CRM REQUIREMENTS

Overview

We have an application named “LinenFinder” (abbreviated as LF) that will ingest lead information, apply an algorithm and then distribute the leads via API to Odoo for that customer to use Odoo as a white labeled CRM. These customizations need to be on the Enterprise version of Odoo and be easily applied to future versions of Odoo 17 (ideally applied to major versions as well).

Delivery

All work should be committed to <https://github.com/linenmaster/infinite-laundry-crm/> using feature branches and pull requests.

Versions

Date	Author	Description
2024.08.07	Jeff Miller	Initial draft
2024.08.08	Jeff Miller	Updates based on initial questions
2024.08.22	Jeff Miller	Revisions & additions based on the first draft of the code

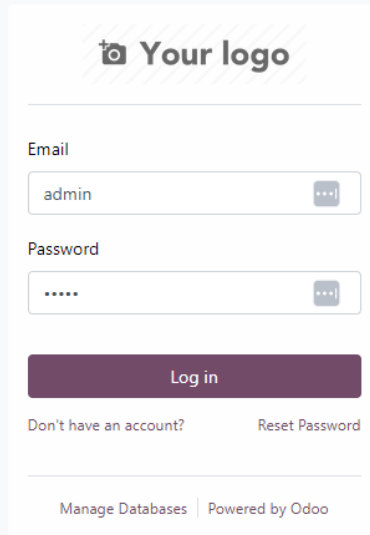
Color Coding

Yellow highlight – changes made in the most recent version.

Green highlight – approved / solved requirement.

Page-by-page requirements

Login:



A login form mockup centered on a light gray background. At the top, there is a logo placeholder consisting of a camera icon and the text "Your logo". Below this is a horizontal line. The form contains two input fields: "Email" with the text "admin" and a toggle icon, and "Password" with masked dots and a toggle icon. A dark purple "Log in" button is positioned below the password field. Underneath the button are two links: "Don't have an account?" and "Reset Password". At the bottom, separated by a horizontal line, are two footer links: "Manage Databases" and "Powered by Odoo".

1. We need to know what file to change & the requirements for changing the dimensions of the “Your Logo” image.
2. Please remove the “Manage Databases” and “Powered by Odoo” links
3. For Odoo overall, we need to be able to customize the colors. Please identify where the CSS is to customize.

Offline:

I'm not sure why, but this page no longer shows up...



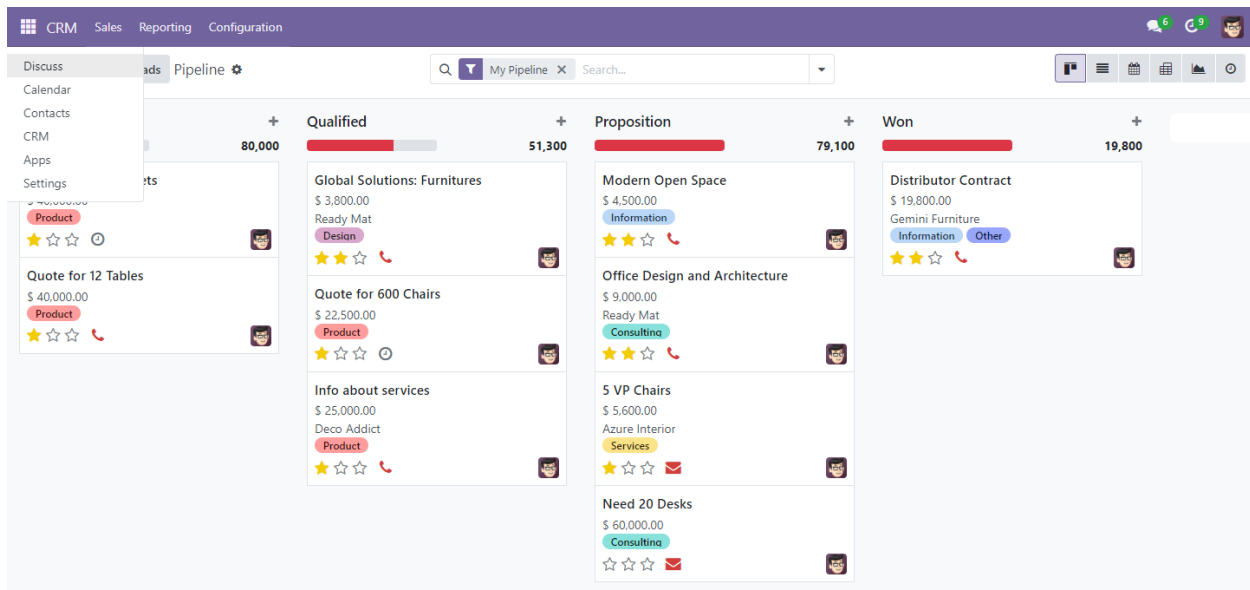
You are offline

Check your network connection and come back here. Odoo will load as soon as you're back online.

Check again

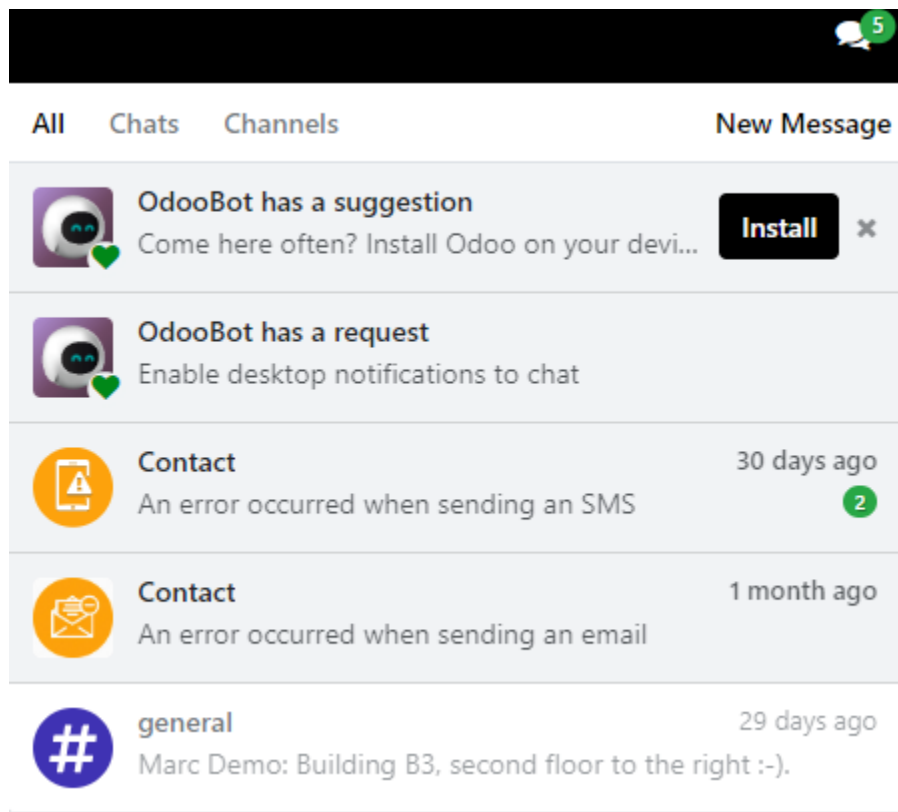
1. We need to be able to change the “O” image and the content on this page.
2. I assume that in Login item 3 (above) the colors / styles will apply to this page.

CRM Homepage:



1. Overall, we need to remove all references to Odoo.
 - a. There are still references to “Odoo” in new user creation & modification.
 - b. There are a lot of “Learn More” links that we want to remove because they link out to Odoo.
2. In the upper left 9 box menu, we need to conditionally remove “Apps” and “Settings”
 - a. These are still visible, but we should change the requirement above to be:
 - i. “Apps” and “Settings” should only be accessible to administrators via direct URL (remove the link).
3. We need to remove the “Generate Leads” button.
 - a. I don’t know what this is for, so maybe there’s value, but I didn’t see the value for us.
4. We will not want sample data to populate when we launch a new instance.
5. In the upper right profile menu:
 - a. Remove Documentation & Support links
 - b. We would also like to remove references to Odoo in the “Preferences” modal.
 - i. There is still a reference to Odoo in the API keys section.
API Keys are used to connect to Odoo from external tools without the need for a password or Two-factor Authentication. [Learn more](#)
 - ii. Please change this to:
API Keys are used to connect to Infinite Laundry CRM from external tools without the need for a password or Two-factor Authentication. (remove the “Learn more” link too)
 - c. We need to remove the link “My Odoo.com Account”

Discussion:



1. We would like to change "OdooBot" to "InfiniteLaundryBot". Again, we need to remove mentions to "Odoo"
2. Please provide instructions to configure SMS.
3. Please provide instructions to configure Email.

API:

4. We need a sample API call for adding a new lead to the CRM.
 - a. Another application will be sending lead / contact information to Odoo via the API.
Please construct the HEADERS and the BODY of a sample request for integration testing.

Module Naming:

1. Please rename the modules from using cyb_ to il_.