**Green Lines – HQ Console Specification**

*Version 1.0 | 15 Oct 2025 | Web Admin | Odoo‑Integrated | Service‑Level Assignments*

# 1. Navigation & Roles

* Top Nav: Dashboard | CRM | Plan Builder | Engagements | Assignments | Catalog & Pricing | Billing | Payouts | Partners & Agents | Documents | Meetings | Analytics | Integrations | Settings
* Roles: Admin, Senior Consultant, Ops Admin, Finance Admin, Partner Success, Read‑only; row‑level security by region/portfolio.

# 2. CRM (with ERP Triage)

|  |  |  |
| --- | --- | --- |
| Field | Type | Rule |
| Customer ERP Status | Select | Required: PARTNER | NON\_PARTNER | NONE |
| ERP Vendor | Select/Text | Visible if status != NONE: Odoo | Zoho | SAP | Other |
| ERP Integration Scope | Multi-select | COA, Customers, Vendors, AP, AR, Inventory, Payroll, Custom |
| ERP Integration Fee | Money | Auto 0 if PARTNER; priced if NON\_PARTNER; hidden if NONE |
| Plan Term | Select | 3 | 6 | 12 months |
| Base Package | Select | Starter | Growth | Enterprise |
| Discount % | Number | >15% needs approval |

* On Won: push Customer, Sales Order, and Invoice draft to Odoo; add Integration SKU accordingly.
* If ERP Status = NONE, must assign Tech Partner before Provision (ERP Gate).

# 3. Engagements & ERP Gate

|  |  |
| --- | --- |
| Tab | Contents |
| Plan | Term, dates, status |
| ERP Gate | Status REQUIRED | INTEGRATION | READY; ERP project link |
| Services | List with SLA/evidence; lock if gate active |
| Milestones | Schedule and acceptance |
| Sessions | Calendar; Teams links |
| Assignments | Primary/Secondary per service; scores; acknowledgments |
| Billing | Invoices & payments (Odoo links) |
| Documents | Vault; tagging; retention |

# 4. Assignments (Smart)

Score = 25\*Proximity + 30\*Skills+Cert + 20\*Availability + 15\*Quality + 10\*Load (0–100) with explainable badges.

|  |  |  |
| --- | --- | --- |
| Field | Type | Notes |
| Service | Lookup | Service within Engagement |
| Primary Agent | Lookup | Required |
| Secondary Agents | List | Optional |
| SLA | Enum | Standard/Expedited/Custom |
| Due | DateTime | Derived from SLA |
| Evidence Rules | JSON | minPhotos, geotag, signature, fileTypes |

# 5. Catalog & Pricing

* Services with SLA defaults, evidence, commission rules (default 40% platform).
* Add‑ons with eligibility; Integration SKUs: ERP‑INT‑PARTNER (0 AED), ERP‑INT‑NONPARTNER (priced).

# 6. Billing & Refunds (Odoo)

* Odoo is authoritative for invoices/credit notes; platform mirrors status.
* PSP webhooks update both systems; refund wizard issues credit note in Odoo.

# 7. Payouts & Commission

* Eligibility: customer acceptance + 30 days; no pending refunds.
* Partner statements with adjustments; weekly payout run.

# 8. Partners & Agents

* Profiles include certifications, exams, annual fees, service areas, languages, utilization, CSAT/NPS.
* ERP Tech Partners flagged; ERP project templates available.

# 9. Integrations

|  |  |  |  |
| --- | --- | --- | --- |
| Platform | Odoo Model.Field | Direction | Notes |
| Account.name | res.partner.name | → | Create/Update |
| Account.trn | res.partner.vat | → | VAT/TRN |
| SalesOrder | sale.order | → | Plan + add-ons + SKU |
| Invoice.status | account.move.state | ↔ | Paid/Overdue |
| CreditNote | account.move(reversal) | ↔ | Refunds |

# 10. APIs (Samples)

Create Engagement

POST /api/engagements { accountId, termMonths, services[], erpGateStatus }

Assign Agent

POST /api/assignments { serviceId, primaryAgentId, sla, evidenceRules }

# 11. Acceptance Criteria

* ERP Status mandatory; Partner ERP → 0 fee; Non‑Partner → add SKU; No ERP → Tech Partner before Provision.
* Engagement cannot be Active until every service has a Primary agent.
* Evidence enforcement configured per service and reflected to Agent app.
* Payouts scheduled T+30 post‑acceptance; refunds reduce partner share automatically.