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Client documents.
Without the chase.

Your client photographs each document on their phone. You receive it encrypted, with a log that tells the whole story, from link to upload.

Odoo 18 module | Document Requests

symbifox.com | hello@symbifox.com

The reality

What asking for documents by email costs you

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ID cards sitting in inboxes

The ID arrives as an attachment, then lives on in three mailboxes. Nobody will think to delete it.

Chasing by hand

One is missing. You follow up, the client resends everything, or the wrong one, and the file waits.

Nothing to show

Who received what, when, and how long you kept it: the question comes up, and the answer doesn't exist.

The solution

One link, one phone, one complete file

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1

A catalogue of documents

ID, proof of address, insurance, income, each with your own instructions to the client.

2

A link by email or text

No account and no password for the client. The link only opens an upload.

3

Straight from the phone camera

"Take a photo" opens the rear camera. A file or a PDF works too.

4

Received encrypted

Files go straight to Secure Transfer storage, then reach you through a protected link.

5

A log that holds up

Every step is timestamped and hash-chained (SHA-256). The PDF certificate tells it all.

Every request, at a glance

With sample data

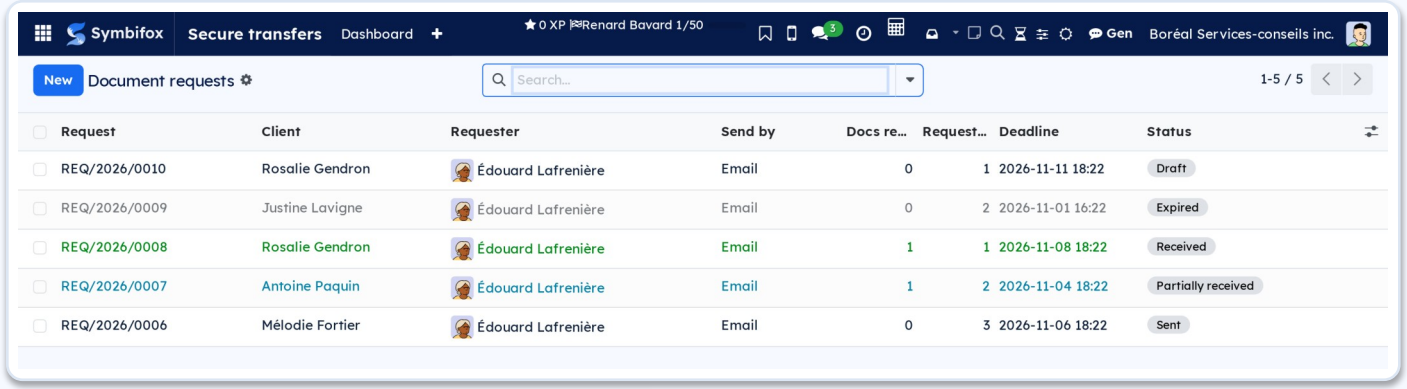
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Where each client stands

Sent, partially received, received, with documents in against documents requested.

Deadlines that hold

Past the deadline, the link stops working and the request closes on its own.



Drafts wait for you

Prepare a request now, send it when the file is ready.

Pick, tick, send

A partially received request

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Client and channel

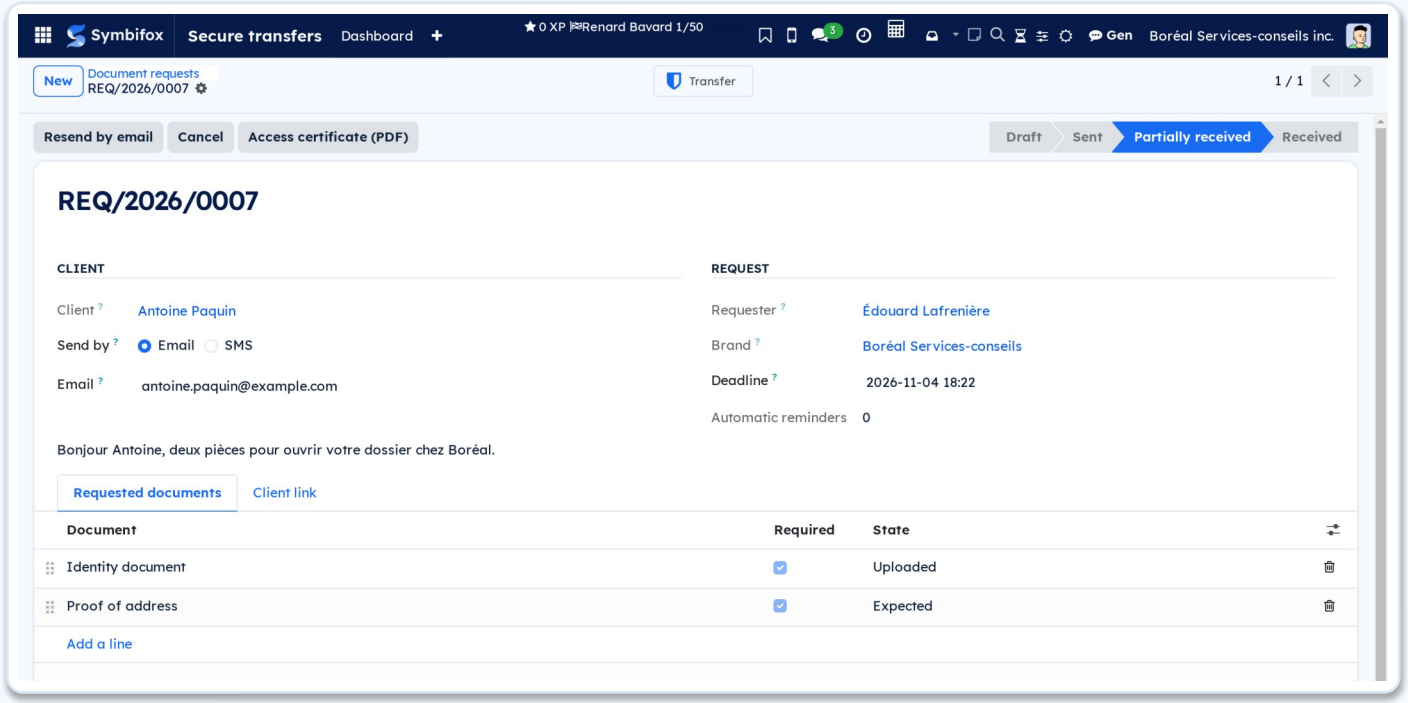
Email, or text message once VoIP.ms texting is set up.

A note at the top

Your message appears on the client's page, above the documents to provide.

What's missing, at a glance

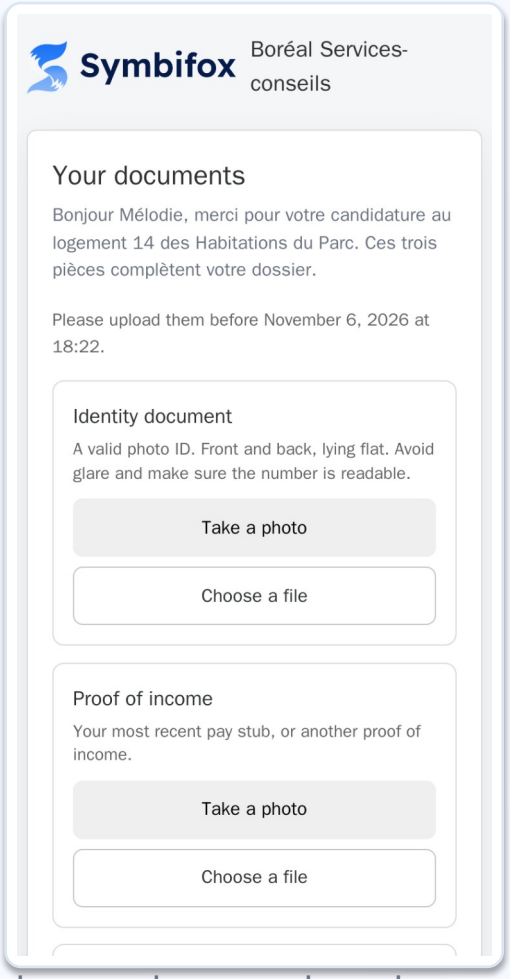
Uploaded or expected, document by document. Reminders only name what's missing.



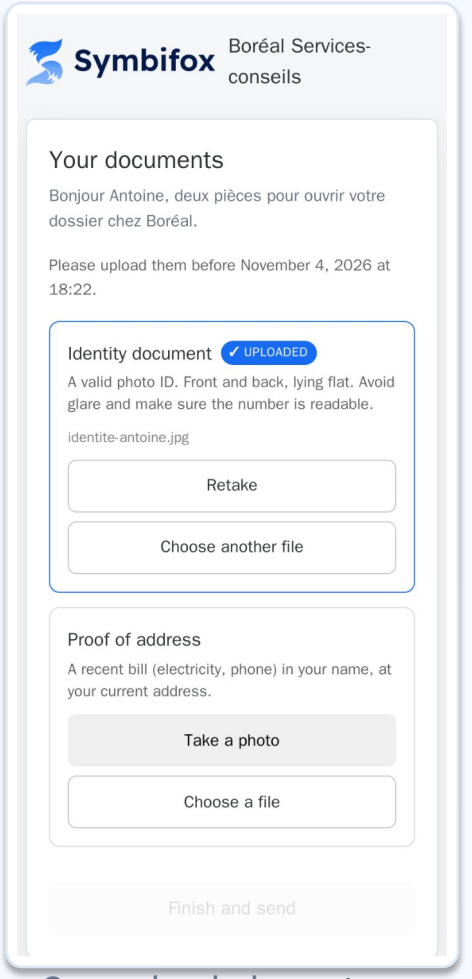
Your client, on their phone

No app, no account

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Link opened: one card per document



One uploaded, one to go

Upload, then delivery

Nothing passes through your server

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Browser to storage

Files go directly to object storage. Odoo never handles the bytes.

Retake before sending

A blurry photo can be retaken until the client taps "Finish and send".

Every file checked

On submission, each file is checked on storage before the request closes.

A protected download link

The documents reach you through Secure Transfer, with its expiry and purge.

The link only opens an upload

The client's link gives access to nothing else. The server fixes where the files go when the request is sent, so a client cannot redirect their own documents. It stops working at the deadline, or as soon as the client's address changes.

What runs without you

Reminders, deadlines, retention

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1	**Automatic reminders**	On the delay and count set per brand, through the request's own channel.
2	**Only what's missing**	A reminder lists only the documents still expected.
3	**Capped text reminders**	A daily cap on text reminders keeps the quota free for first sends.
4	**Deadlines enforced**	Past the deadline, the link stops working and the request closes.
5	**No forgotten requests**	With no deadline, a request closes after 30 days. You can change that.
6	**Shortest retention wins**	A document meant to live a day never lives a month because another one may.
7	**Purge on expiry**	Files leave storage when the retention period ends.
8	**In the client's language**	The page follows their browser; email and texts follow their contact record.

A record that holds up

One log, one chain

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Hash-chained with SHA-256

Each step of the request joins the same chain as the file accesses.

The certificate tells it all

The transfer's access certificate (PDF) carries the request's full history.

Uninstall refused

With request history in the database, uninstalling is refused rather than breaking the chain.

What the log records

- Request sent
- Page opened by the client
- Each document uploaded
- Reminders
- Request completed
- Cancellation or expiry

Who does what

Destinations don't change quietly

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By role

Employee

Creates and sends requests, tracks what comes in, sends reminders.

Manager

The only one who can read a request's link. Can correct a destination.

Client

No account. Their link only opens an upload, until the deadline.

Built-in protections

Destination guard

Once sent, only the requester, a manager or an admin can change the channel or address.

The link rotates

Changing the address or number kills the old link on the spot.

Protected states

Status, dates and files are only written by the module's own actions, never from outside.

A link email filed nowhere

The link email is attached to no record, so the upload key never lingers in a file.

Law 25: with the Privacy module

Two bridges, installed automatically

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Every purge in the register

One unalterable entry per destruction: request, client, documents, retention rule.

A category per document

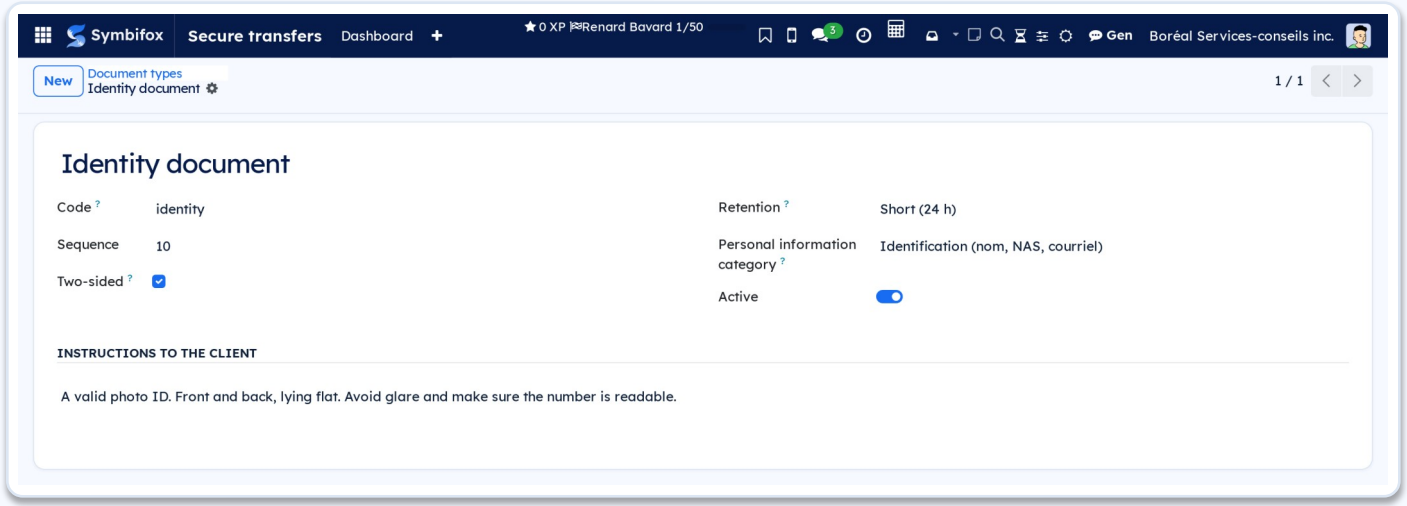
Each document type declares the category of personal information it carries.

The purpose on record

Document collection enters the register of processing, with its legal basis and retention.

Documented periods

Each expiry policy links to a rule in your retention schedule.



In short

1. **A link, not an attachment**
   The client photographs, you receive, nothing sits in inboxes
2. **No account for the client**
   The link only opens an upload, until the deadline
3. **Reminders that hit the mark**
   Only what's missing, at the pace you set
4. **Kept as long as intended**
   The shortest policy wins, then the purge
5. **A record you can show**
   Chained log, PDF certificate, Law 25 register

Shall we show you on the demo?

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Thank you!

Let's talk?



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