
odoo
ODOO System
in
Hotel Front Desk
Operations
Quick Guide

This manual may be reproduced for the use of Lead Faculty involved in the implementation of HMS for HRM and Tourism students.

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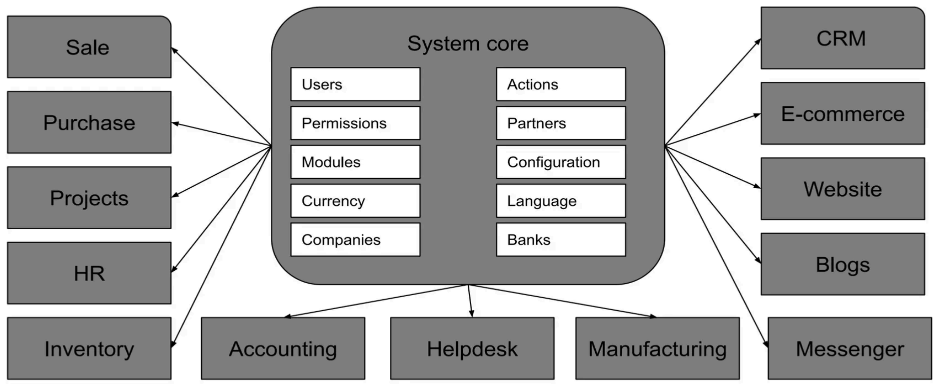
I. INTRODUCTION TO ODOO SYSTEM

A. OVERVIEW OF ODOO SYSTEM

ODOO is a comprehensive, open-source Enterprise Resource Planning (ERP) software that provides a wide range of business applications to streamline various business operations. ODOO integrates multiple functions into a single cohesive platform, enhancing productivity, efficiency, and collaboration across different departments. It has a smooth and friendly user experience that was built to ensure the user's seamless adoption.

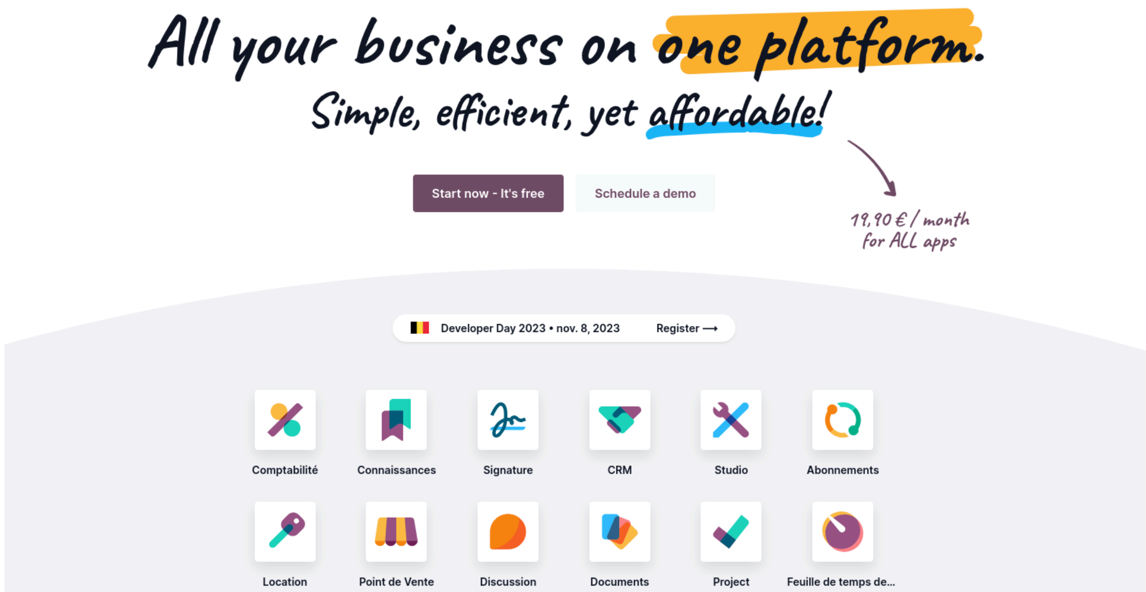
B. Key features and benefits of ODOO

Odoo - modules



1. **Modular Structure**
   a. **Applications**: ODOO consists of over 30 core applications covering various business needs such as sales, CRM, accounting, inventory, manufacturing, HR, and more.
   b. **Customization**: Users can choose and customize modules based on their specific business requirements, making ODOO highly adaptable.
2. **Unified Platform**
   a. **Integration**: Seamlessly integrates different business functions, ensuring data consistency and reducing duplication of efforts.
   b. **Centralized Data**: All business data is centralized, providing real-time access and enhancing decision-making.
3. **User-Friendly Interface**
   a. **Intuitive Design**: The interface is designed to be user-friendly and easy to navigate, reducing the learning curve for new users.
   b. **Responsive**: Accessible from various devices, including desktops, tablets, and smartphones.
4. **Customization and Flexibility**
   a. **Development Framework**: ODOO's framework allows for extensive customization and development of additional features.
   b. **Community and Enterprise Versions**: Available in both community (free) and enterprise (paid) versions, catering to businesses of different sizes and needs.

C. APPLICATIONS



FINANCE

Accounting

Invoicing

Expenses

Spreadsheet (BI)

Documents

Sign

SALES

CRM

Sales

Point of Sale - Shop

Point of Sale - Restaurant

Subscriptions

Rental

WEBSITES

Website Builder

eCommerce

Blog

Forum

Live Chat

eLearning

SUPPLY CHAIN

Inventory

Manufacturing

PLM

Purchase

Maintenance

Quality

HUMAN RESOURCES

Employees

Recruitment

Time Off

Appraisals

Referrals

Fleet

MARKETING

Social Marketing

Email Marketing

SMS Marketing

Events

Marketing Automation

Surveys

SERVICES

Project

Timesheets

Field Service

Helpdesk

Planning

Appointments

PRODUCTIVITY

Discuss

Approvals

IoT

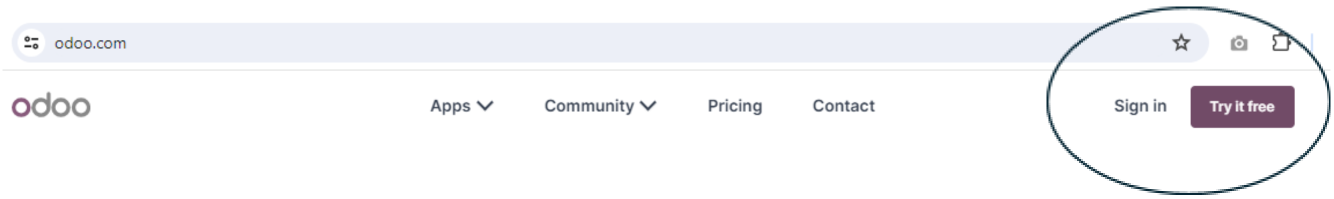
VoIP

Knowledge

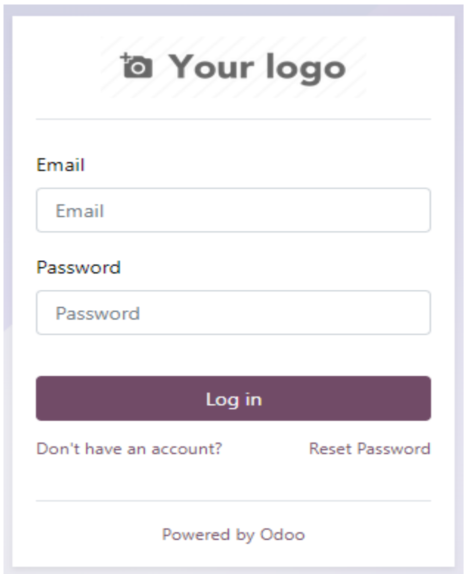
WhatsApp **New!**

D. Accessing ODOO System

- **Set up your account:** If you haven't already, sign up for an account with Odoo CRM. You can choose between the free and paid plans depending on your needs. Once you have signed up, you will be prompted to create a new database.
    - Go to ODOO website, type https://www.odoo.com/ in the search bar.
    - Click "SIGN IN" if you already have an account or "TRY IT FOR FREE" for beginners.



E. SIGN IN, UP WINDOW, DASHBOARD



SIGN IN PAGE

- Email
- Password
- Log in Button
- Create an Account Button
- Reset Password Button

SIGN UP PAGE

- Your Email
- Your Name
- Password
- Confirm Password
- Sign Up Button
- Already have an account

DASHBOARD

This page serves as the main interface where you can access various Odoo modules, manage data, and perform administrative tasks.

1. Access the Odoo Login Page

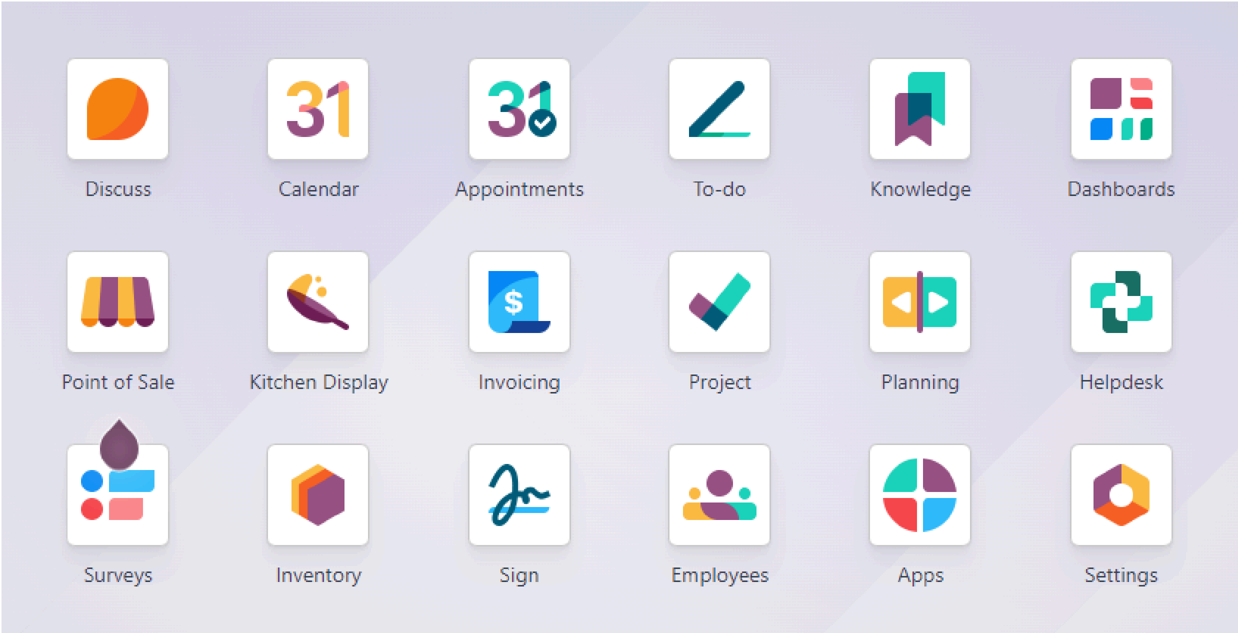
- Open your web browser.
- Enter the URL for your Odoo instance. This is usually in the format http://yourdomain.com or http://yourcompany.odoo.com.

2. Log in to Odoo

- Enter your username and password on the login page.
- Click the "Log in" button.

3. Navigate to the Dashboard

- Once logged in, you will be directed to the main dashboard or the module you last accessed.
- If you are not on the main dashboard, look for the menu bar at the top of the page.



4. Customize Your Dashboard (Optional)

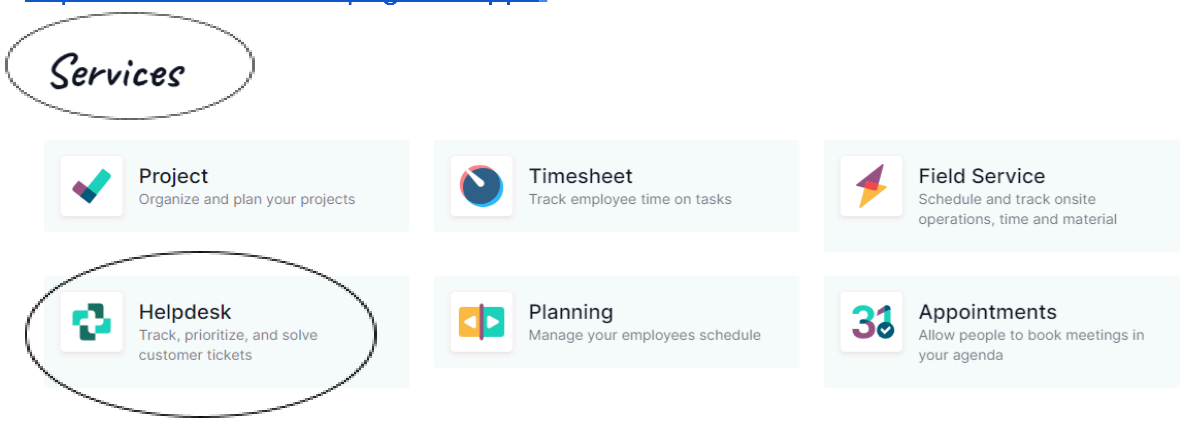
- You can customize the dashboard by adding different apps or widgets to view the information most relevant to you.

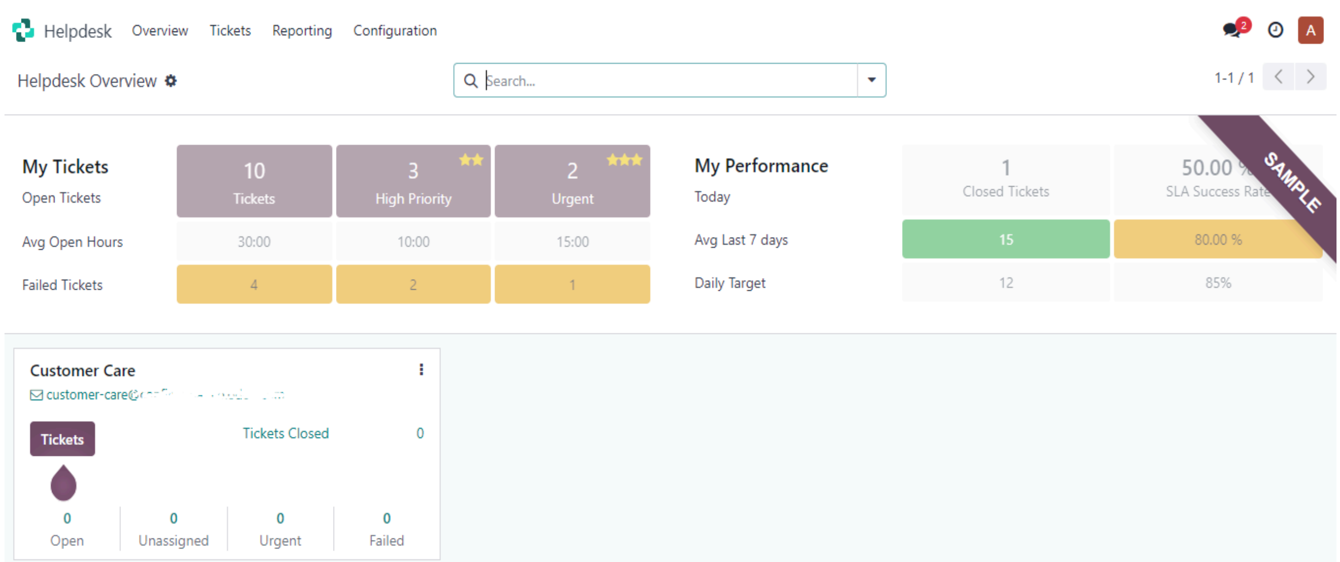
II. OVERVIEW OF ODOO HELPDESK

A. INTRODUCTION TO ODOO HELPDESK

Odoo Helpdesk is a ticketing-based customer support application. Multiple teams can be configured and managed in one dashboard, each with their own pipeline for tickets submitted by customers. Pipelines are organized in customizable stages that enable teams to track, prioritize, and solve customer issues quickly and efficiently.

Customize your dashboard: Once you have created your database, you can customize your dashboard to display the information that is most important to you. For example for a hotel front desk operation, to choose your app you will scroll down at the website to look for Services > then click **HELPDESK** or open this link [https://www.odoo.com/page/all-apps.](https://www.odoo.com/page/all-apps)





B. NAVIGATING THE HELPDESK INTERFACE

Navigating the Odoo Helpdesk interface involves understanding its various components and how to effectively use them to manage customer support tickets. Here's a step-by-step guide on navigating the Odoo Helpdesk interface:

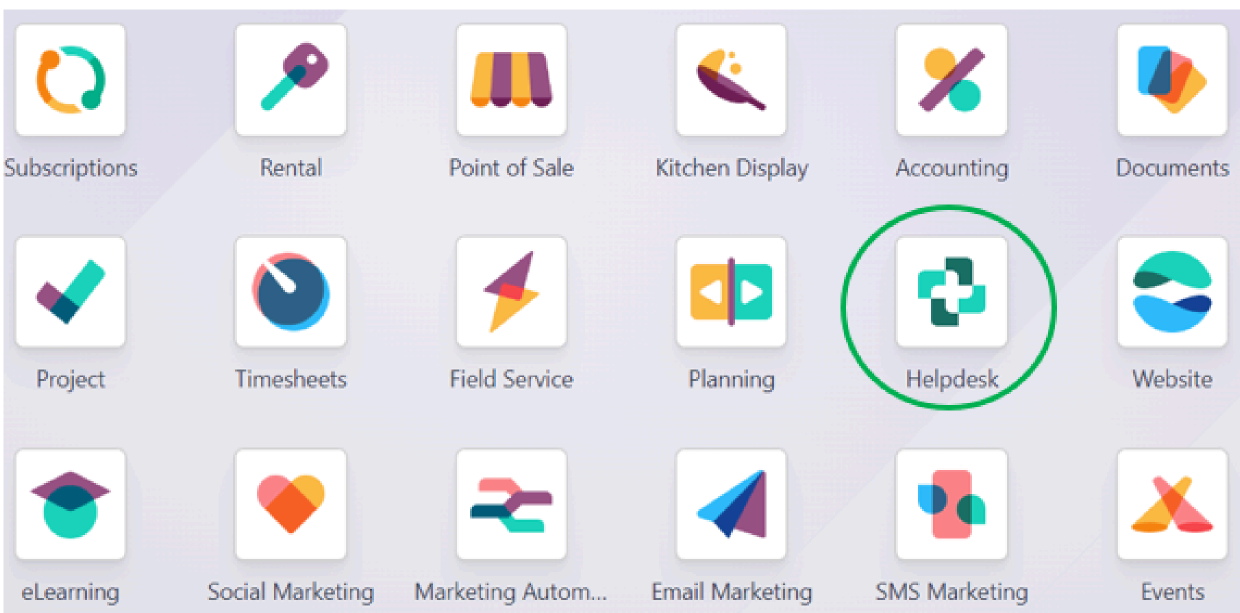
INITIAL CONFIGURATION:

1. Accessing and Installing the Helpdesk Module

- Log in to Odoo:
- Use your credentials to log into your Odoo instance.

. **2. Initial Configuration**

- Access the Helpdesk Module: -Click on the Helpdesk module icon from the main dashboard.



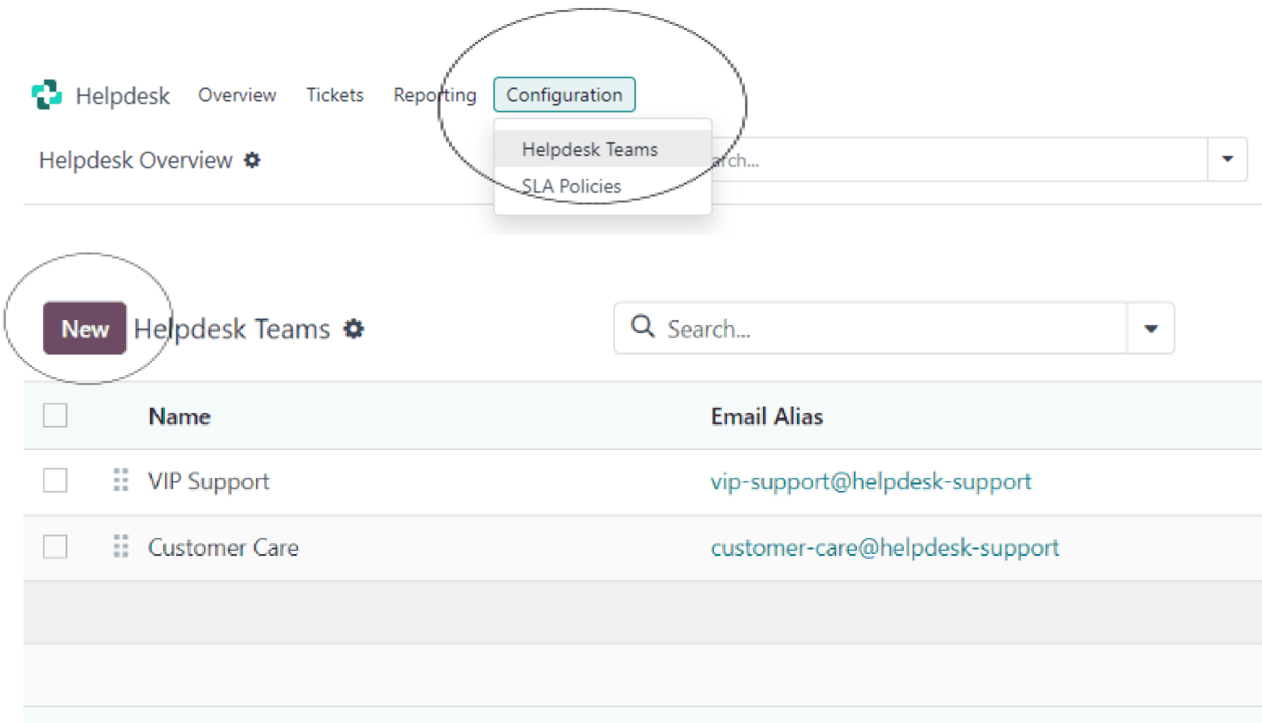
3. Configure Settings:

- Go to Configuration within the Helpdesk module.
- Set up basic configurations:

- Teams: Create different support teams based on departments or expertise.
- SLA Policies: Define Service Level Agreements to ensure timely responses and resolutions.

4. Create a Helpdesk team

- To view or modify Helpdesk teams, go to Helpdesk app ‣ Configuration ‣ Helpdesk Teams. To create a new team, click the New button in the top-left of the dashboard.

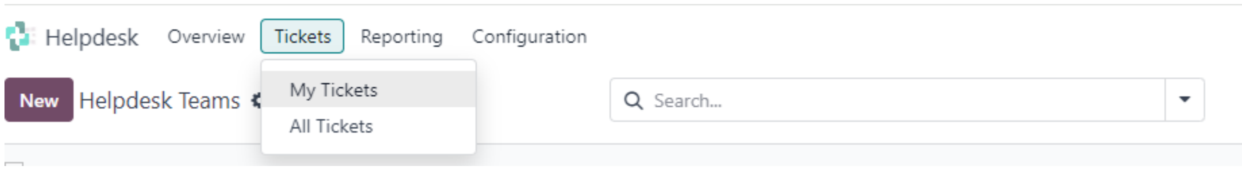


- On the blank Helpdesk team form, enter a Name for the new team. Then, enter a description of the team in the field below the team name, if desired. To change the company this team is assigned to, select it from the Company drop-down menu.

5. Customizing Ticket Types and Categories

Ticket Types:

- Go to Configuration > Ticket
- Create different types of tickets to categorize issues (e.g., Technical Support, Billing, General Inquiry).

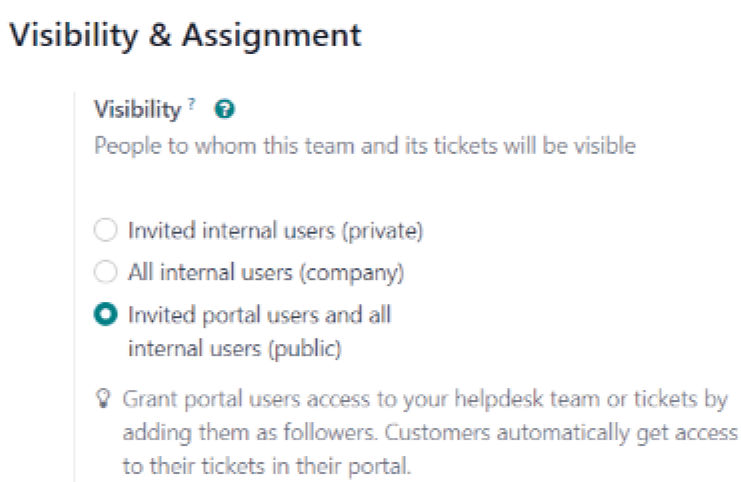


Determine team visibility

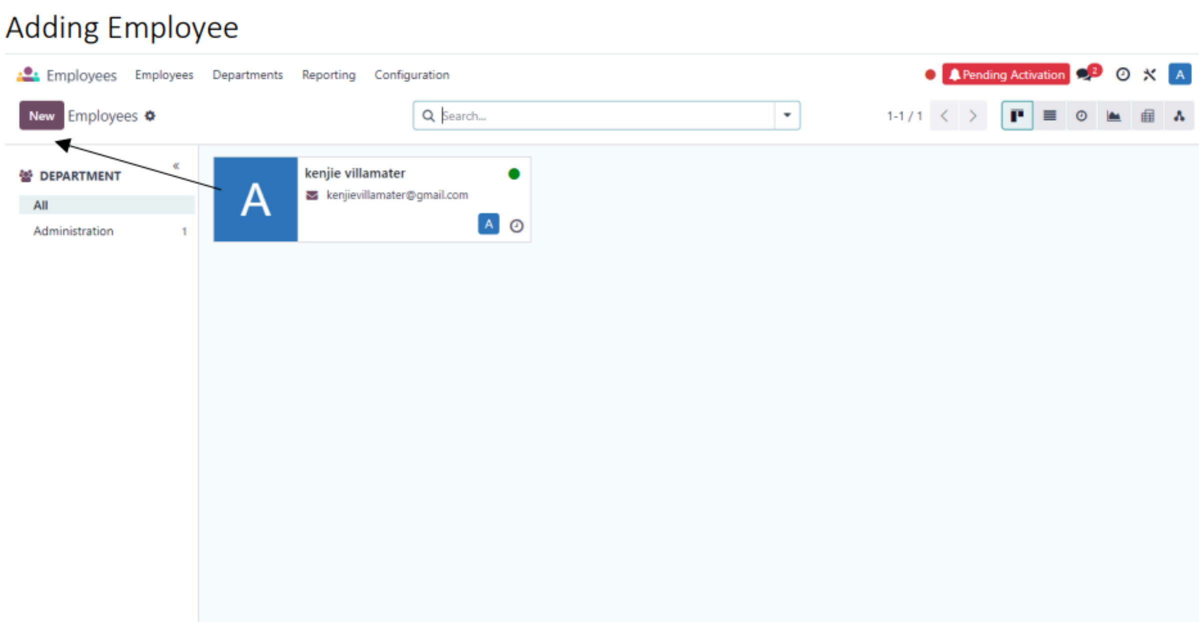
The Visibility settings alter which internal users and portal users have access to this team and its tickets. The Assignment settings alter how users are assigned to handle each ticket.

Under the Visibility section, select one of the following options to determine who can view this team and its tickets:

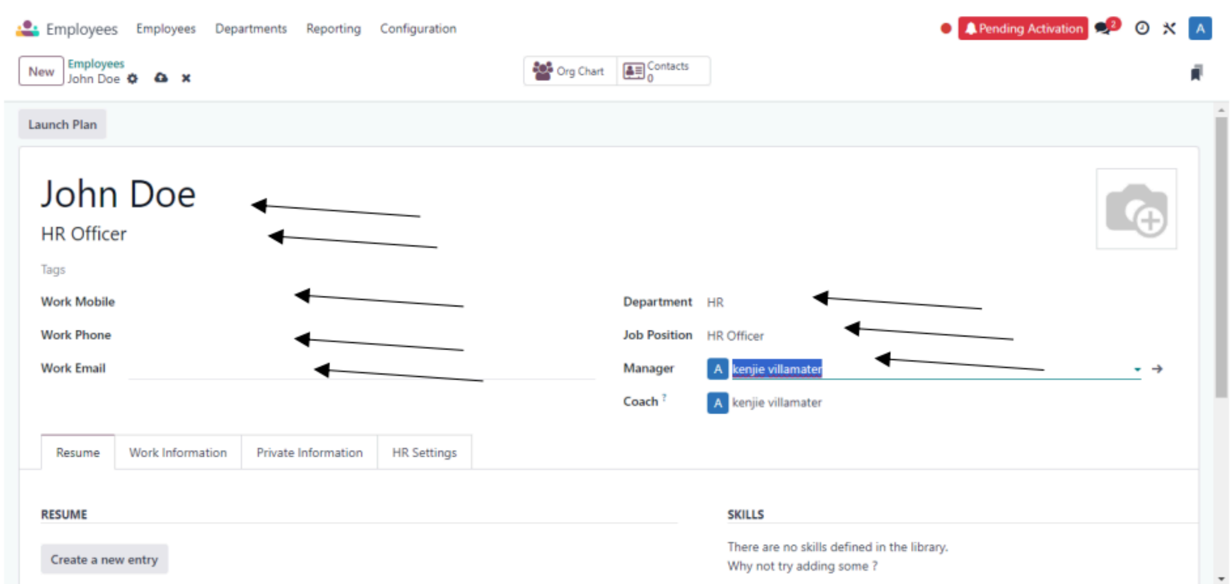
- **Invited internal users (private)**: internal users can access the team and the tickets they are following. This access can be modified on each ticket individually by adding or removing the user as a follower. Internal users are considered invited once they are added as followers to an individual ticket, or to the team itself.
- **All internal users (company)**: all internal users can access the team and all of its tickets.
- **Invited portal users and all internal users (public)**: all internal users can access the team and all of its tickets. Portal users can only access the tickets they are following.



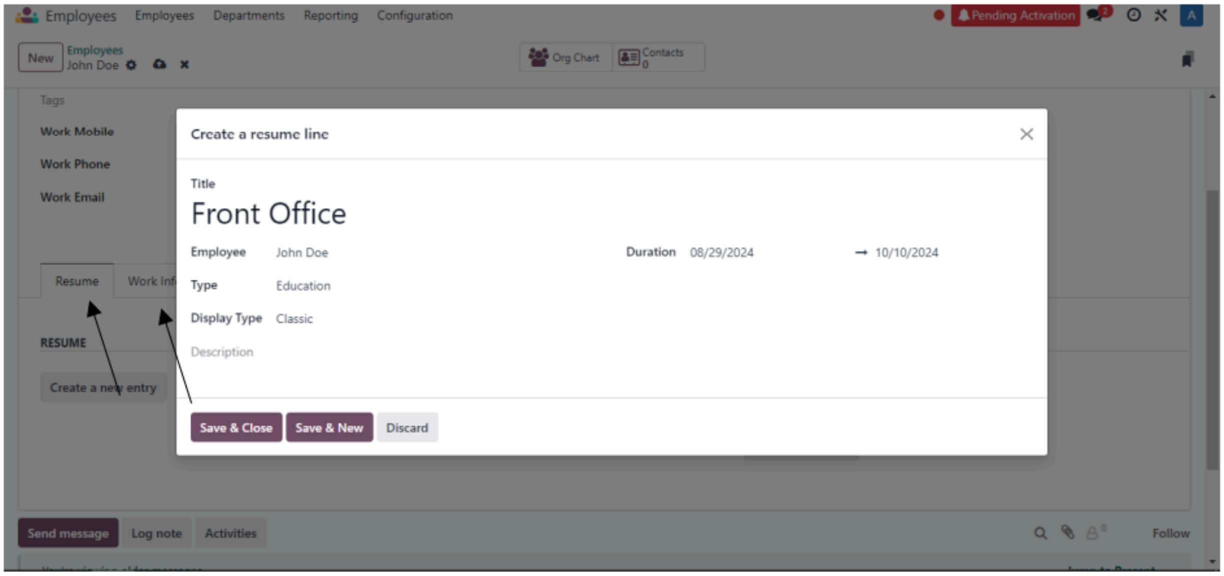
Adding New Employee



From Dashboard click Employee. On Employee Click New.



Input all the information needed for For Department, if the department is not yet created then type the department name and hit enter as well as the job position.

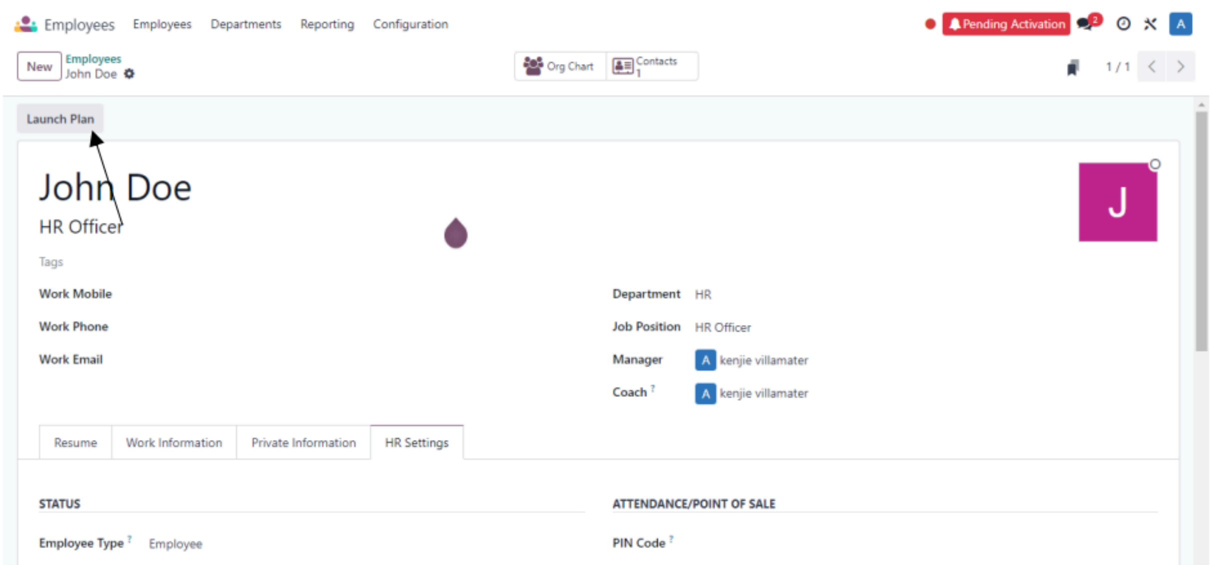


Click Resume, to input all the experience and educational background you have.

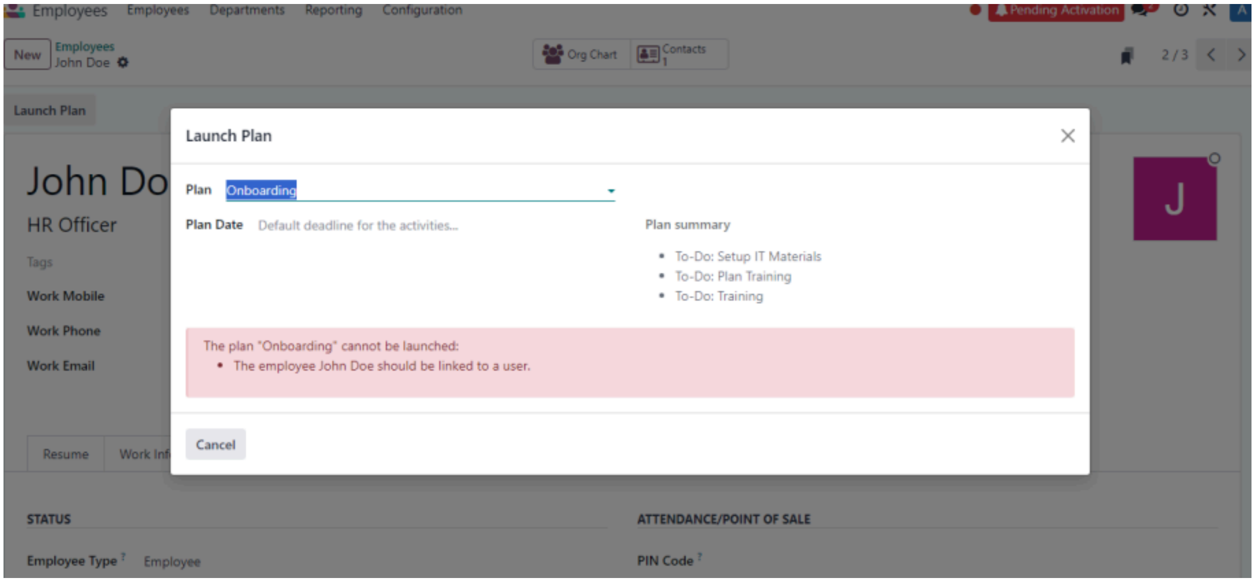
Click Work information to input the job description.

Click private information. This contains the sensitive info's of the employee.

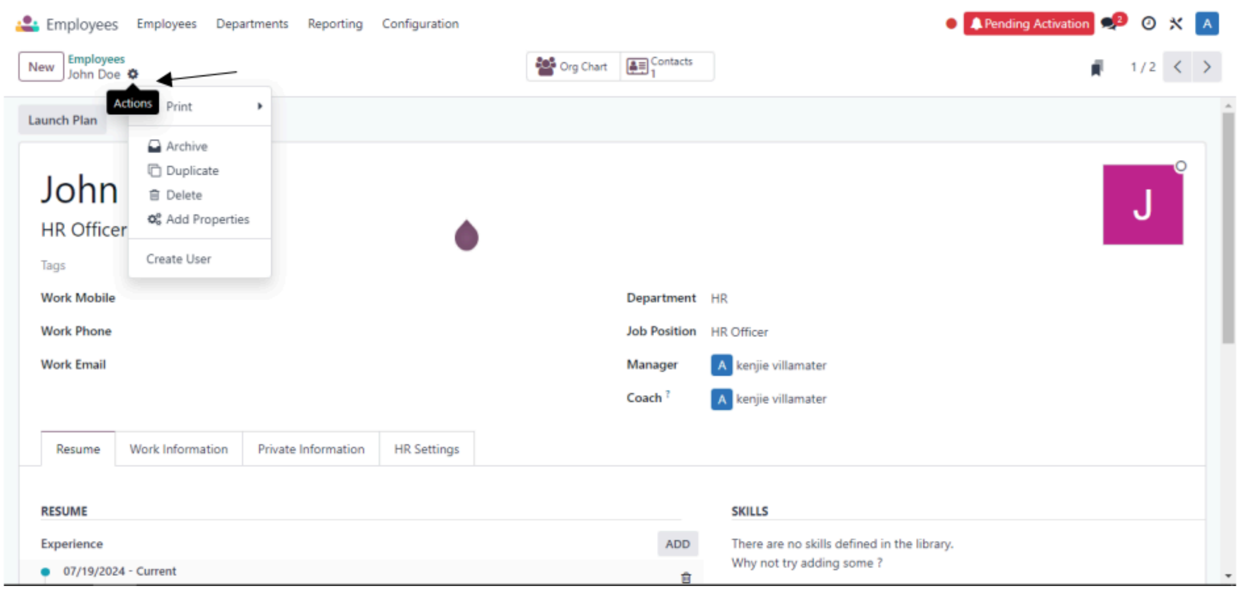
Click HR Settings, to create badge ID and print it.



Click Launch Plan once done filling all the information.



If you see an automated reply just click cancel, go back to Employees and check if the record is created.



Click actions to do a list of commands to an employee record e.g. print record, archive, delete etc.

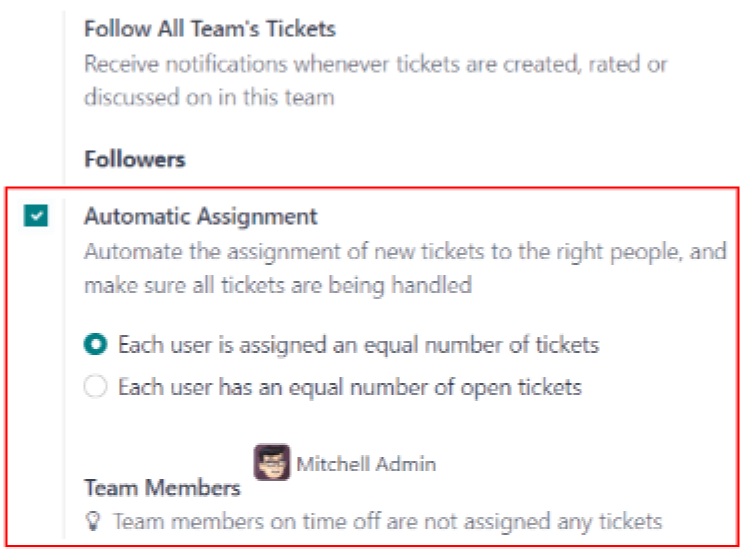
Automatically assign new tickets

When tickets are received, they need to be assigned to a member of the team. This is done either manually on each ticket individually, or through

Automatic Assignment. Check the Automatic Assignment checkbox to enable this feature for the team.

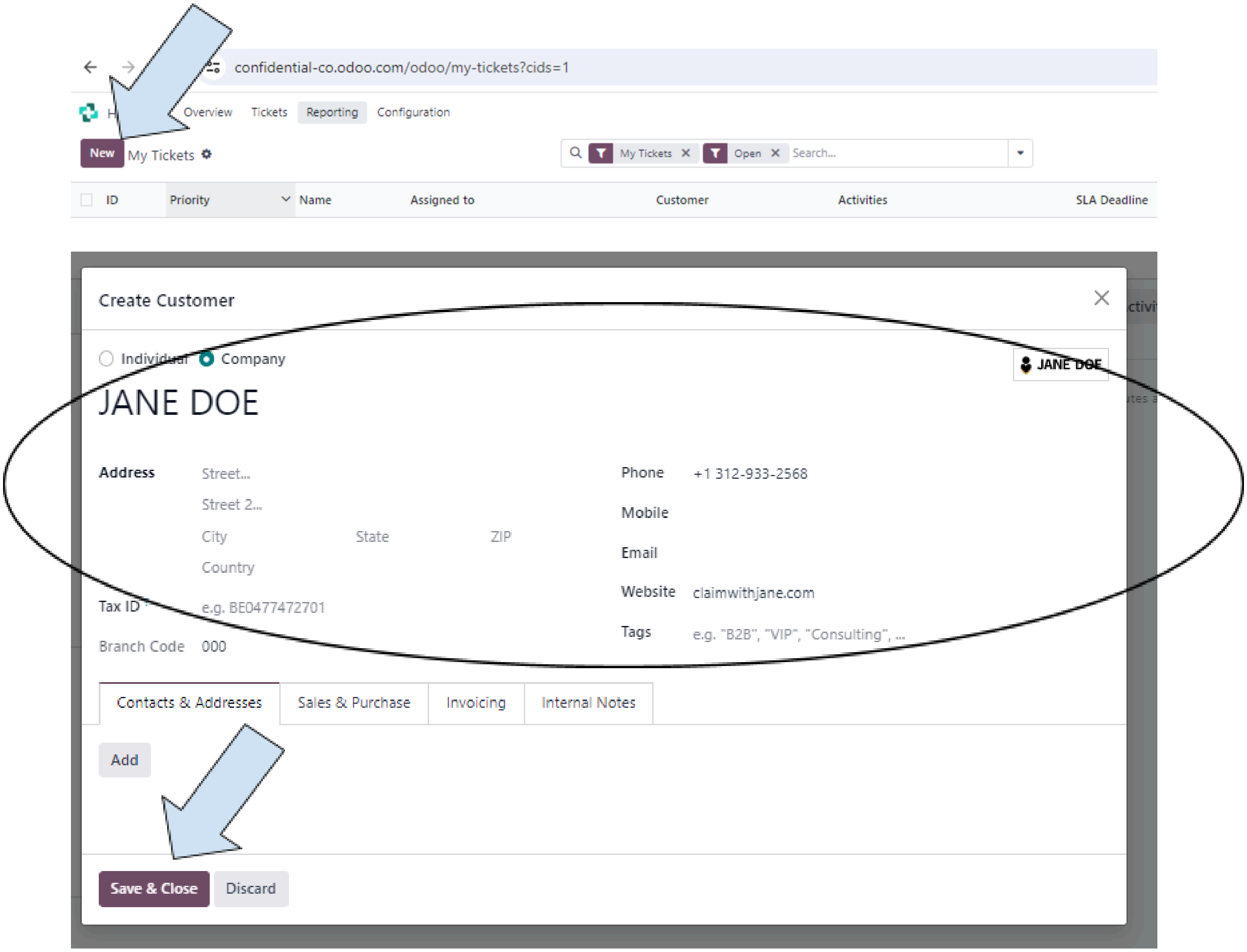
As soon as Automatic Assignment has been enabled, additional fields appear.Select one of the following assignment methods, based on how the workload should be allocated across the team:

- Each user is assigned an equal number of tickets: tickets are assigned to team members based on total ticket count, regardless of the number of open or closed tickets they are currently assigned.
- Each user has an equal number of open tickets: tickets are assigned to team members based on how many open tickets they are currently assigned.

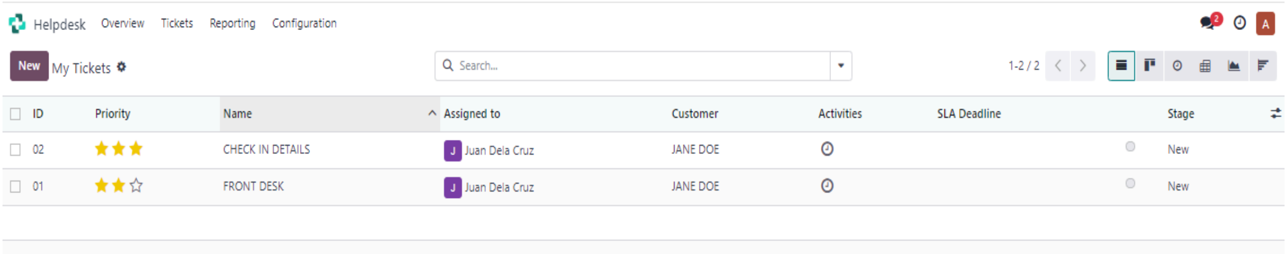


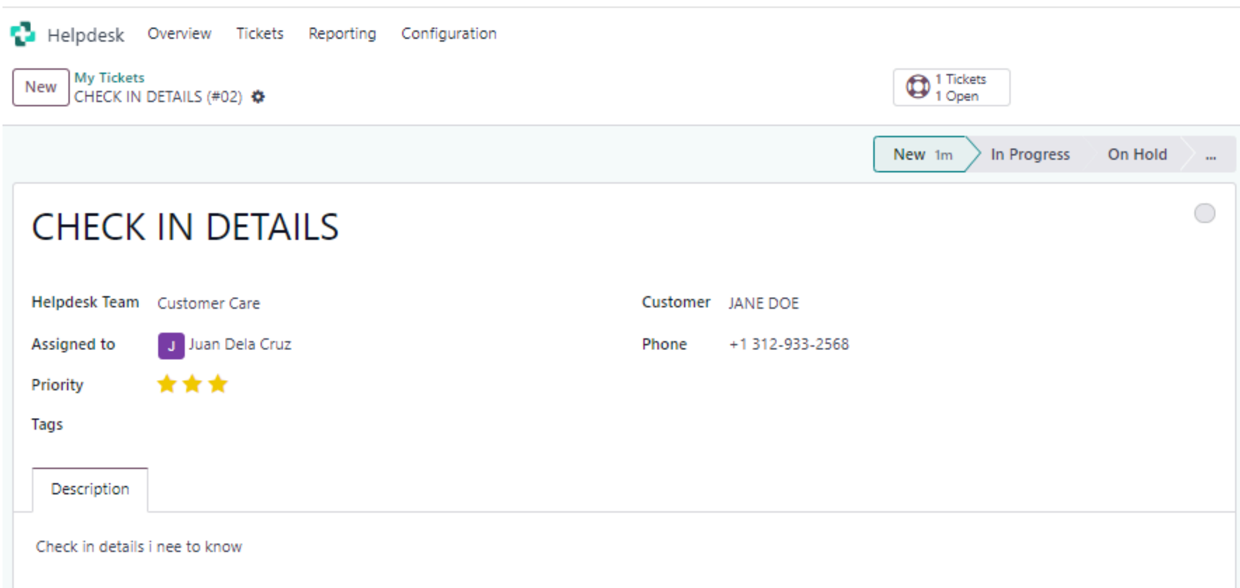
6. Creating and Managing Tickets

- Creating a Ticket:
  - Click the NEW button on the Helpdesk dashboard.
  - Fill in the ticket details: customer information, issue description, priority, and category.
  - Click Save to add the ticket to the system.



- Viewing and Updating Tickets:
  - Use the Kanban View for a visual representation of tickets in different stages.
  - Use the List View for a detailed tabular view, useful for filtering and bulk actions.
  - Click on a ticket to open it and view details.

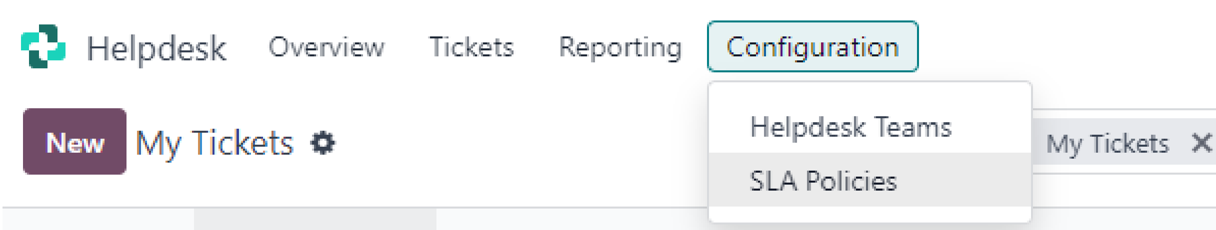




7. Automating Processes

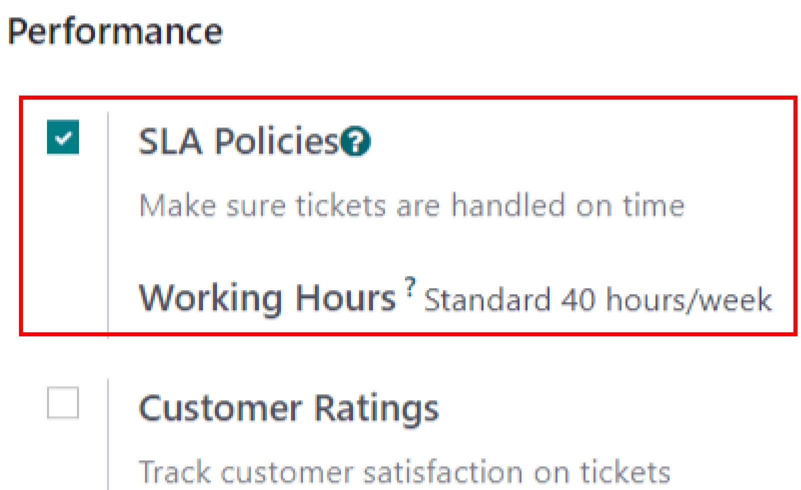
SLA Policies:

- Configure SLAs in Configuration > SLA Policies.
- Define rules for response times and resolution deadlines to ensure service standards are met.



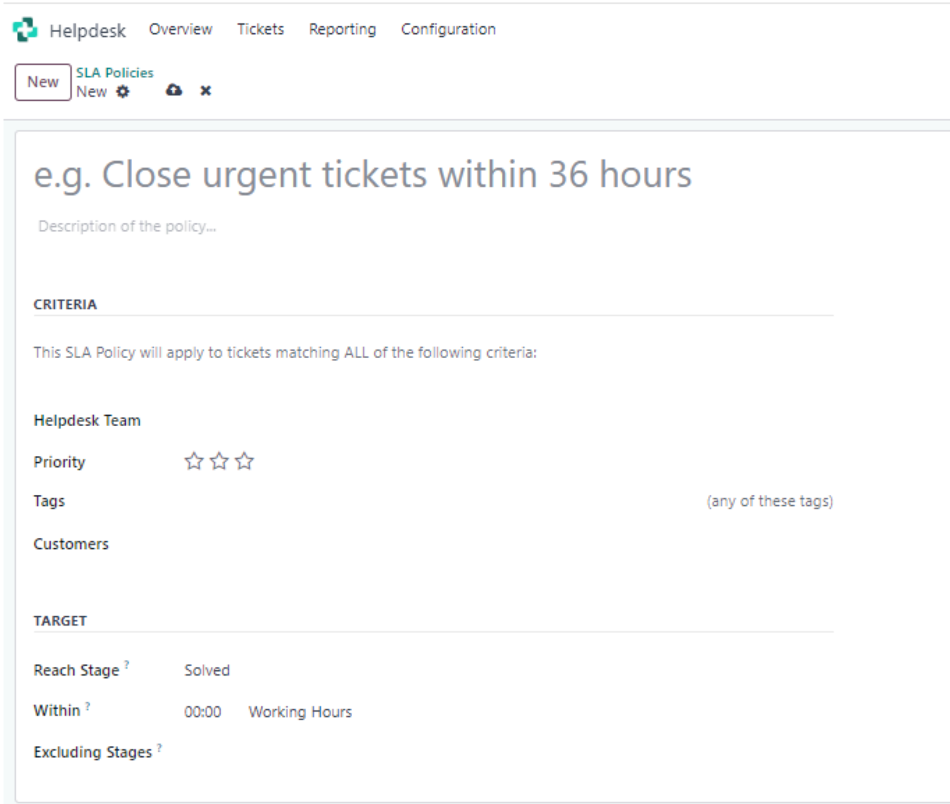
The SLA Policies feature is enabled by default on newly created Helpdesk teams.

- To turn off the feature, or edit the working hours, navigate to Helpdesk app ‣ Configuration ‣ Helpdesk Teams. Click on a team to open that team's configuration page.
- From here, scroll to the Performance section. To turn off the SLAs feature for the team, clear the SLA Policies checkbox.



Create a new SLA policy

- To create a new policy, go to Helpdesk app ‣ Configuration ‣ SLA Policies, and click New.
- Alternatively, go to Helpdesk app ‣ Configuration ‣ Helpdesk Teams, and click on a team. Then, click the SLA Policies smart button at the top of the team's settings page, and click New.

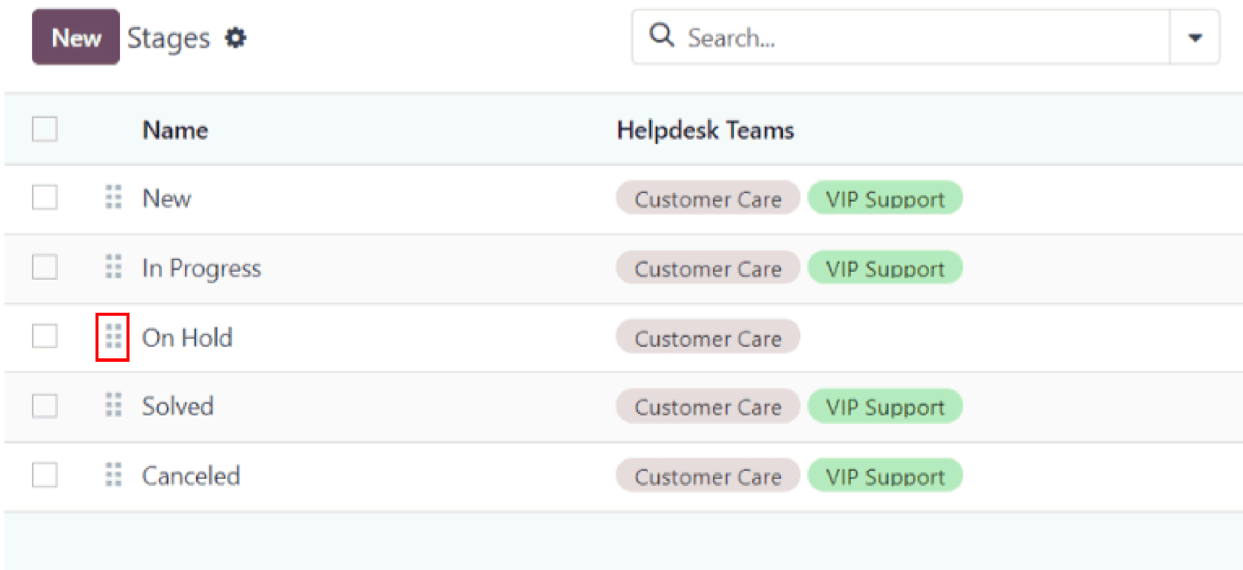


8. Create or modify stages

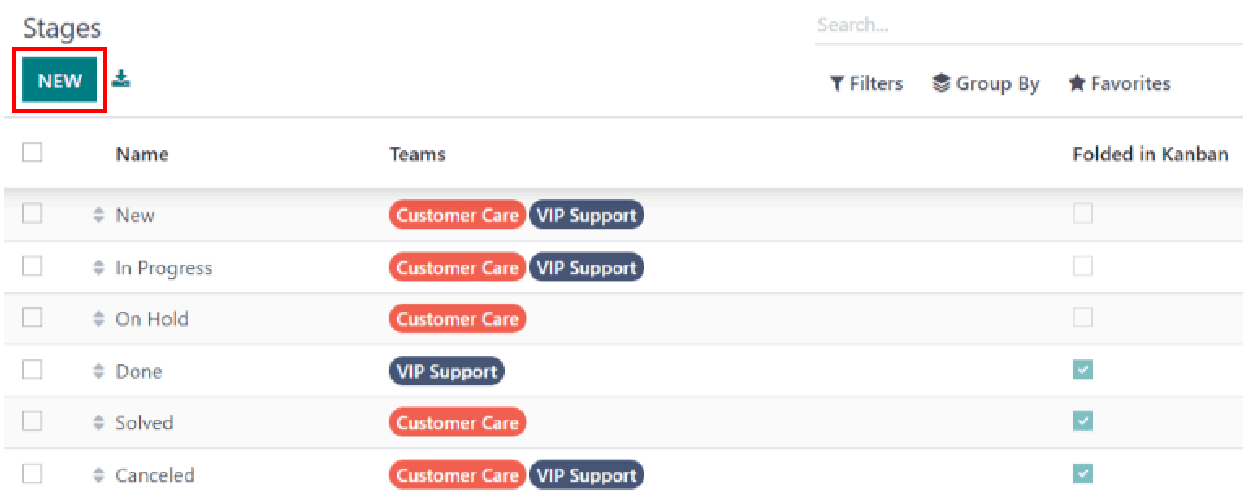
- To view or modify Helpdesk stages, go to Helpdesk app ‣ Configuration ‣ Stages.

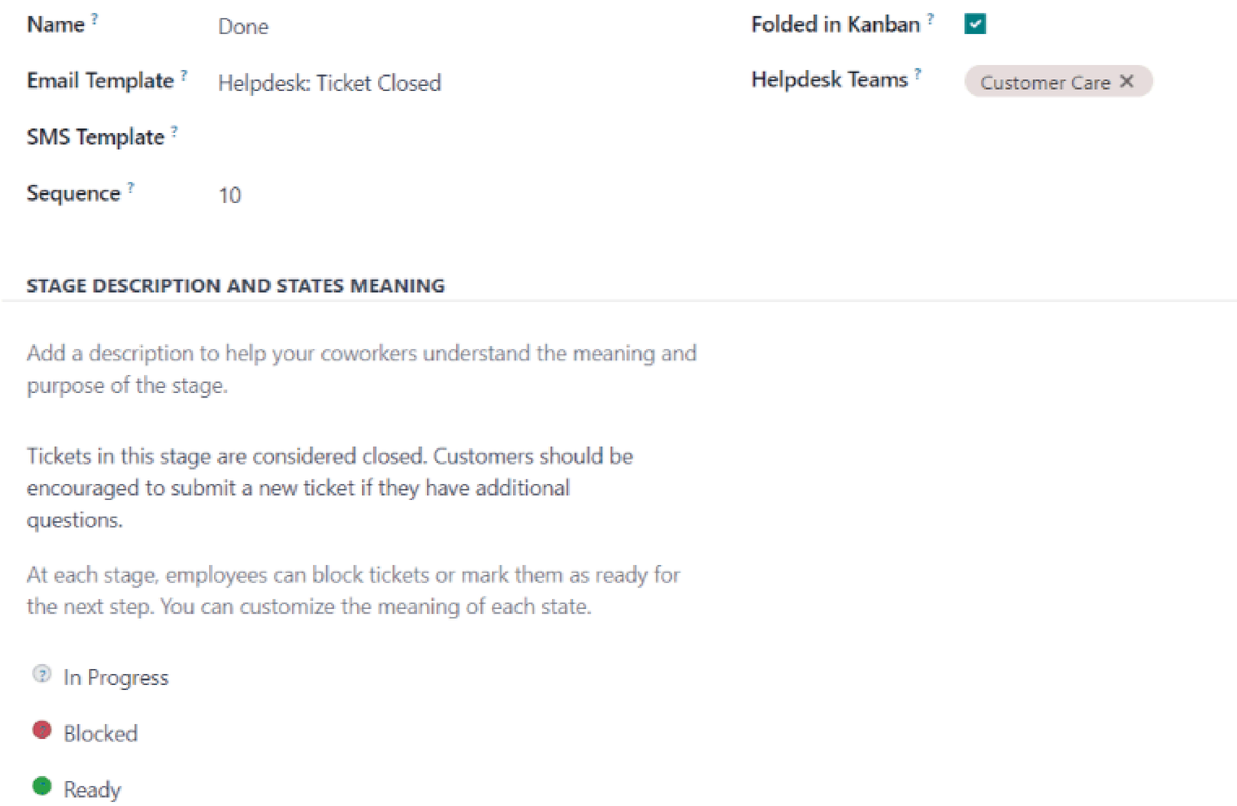
> **Important**
>
> Developer mode must be activated in order to access the stages menu. To activate developer mode go to **Settings ‣ General Settings ‣ Developer Tools** and click on **Activate the developer mode**.

- The default list view on the Stages page displays the stages currently available in Helpdesk. They are listed in the order they appear in the pipeline.
- To change the order of the stages, click the (drag) icon, to the left of the stage name, and drag it to the desired place on the list.



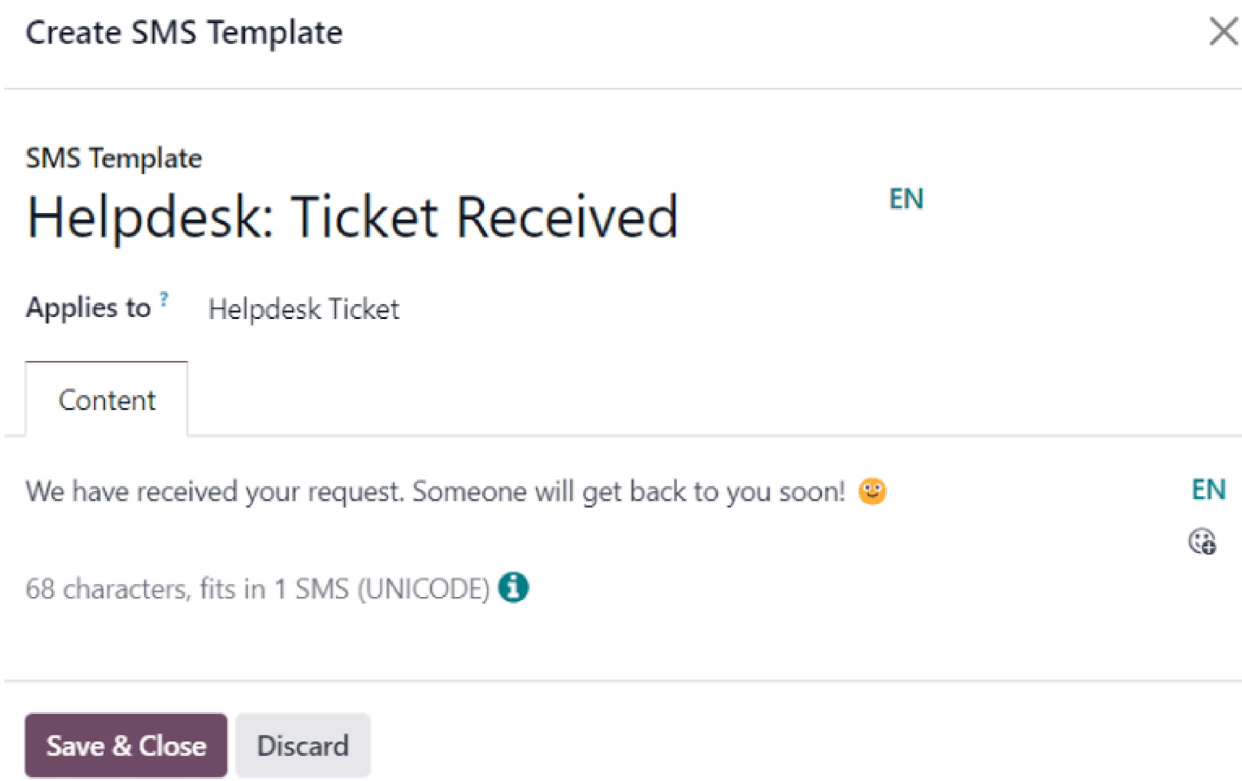
- To create a new stage, click the New button at the top-left of the stage list. Doing so reveals a blank stage form.
- Choose a Name for the new stage, and add a description, if desired. Then, proceed to fill out the remaining fields following the steps below.





Add email and SMS templates to stages

- To select an existing email template, select it from the Email Template field. Click on the (right arrow) icon to the right of the field to edit the chosen template.
- To create a new template, click the field, and enter a title for the new template. Then, select Create and edit from the drop-down menu that appears, and complete the form details.
- Follow the same steps to select, edit, or create an SMS Template.



C. Setting Up the Helpdesk for Hotel Operations

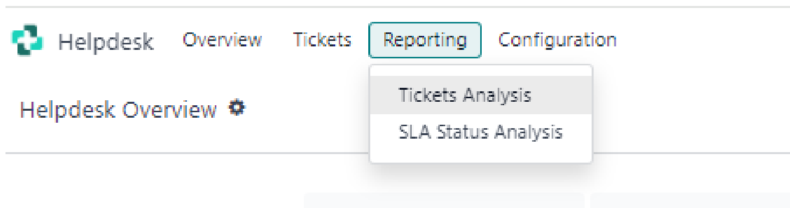
Setting up the Odoo Helpdesk for hotel operations involves configuring the system to handle the specific needs of a hotel, such as managing guest inquiries, maintenance requests, and service issues.

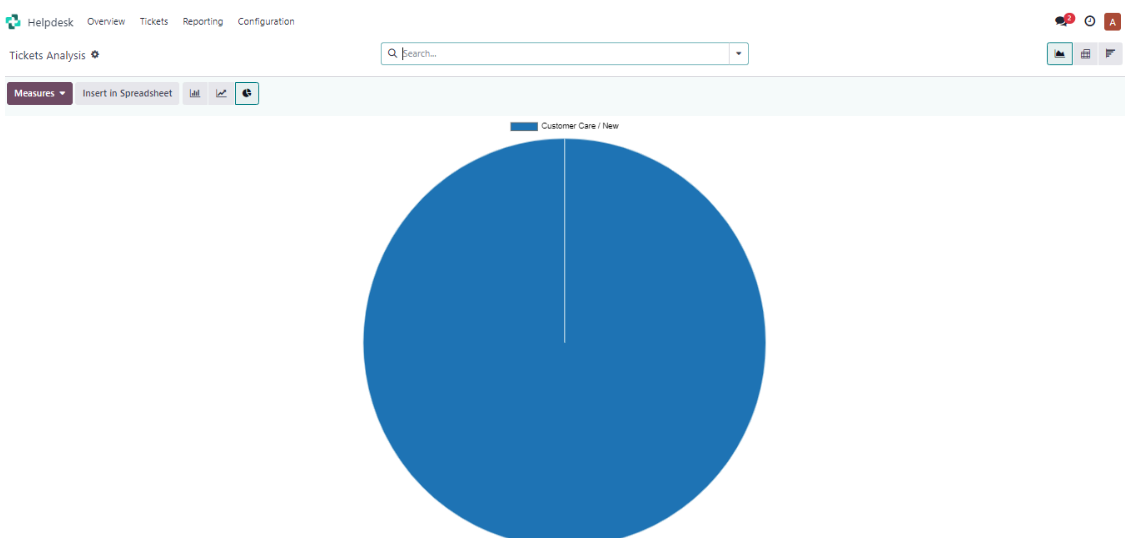
1. Access the Helpdesk Module (Go back to Chapter I, Page 7, Letter D)
2. Configure the basic settings such as enabling the customer portal, setting up email aliases, and defining SLAs (Service Level Agreements).
3. Create different teams based on the hotel's needs, such as Front Desk Support, Housekeeping Requests, Maintenance Requests, and Concierge Services. Assign team members to these teams.
4. Create ticket types relevant to hotel operations, such as Guest Inquiry, Room Service, Maintenance Issue, Housekeeping Request, and Reservation Issue.

5. Define categories to further organize tickets, such as Room Issues, Facility Issues, Billing Inquiries, and Guest Services.
6. Create rules to automate tasks like ticket assignment based on the type or category of the ticket, sending notifications to guests, and updating ticket statuses.
7. Define SLAs for different ticket types to ensure timely responses and resolutions. For example, a high-priority maintenance issue might have a 1-hour response time SLA.
8. Customize Ticket Forms and Fields
    a. Add custom fields relevant to hotel operations, such as Room Number, Guest Name, Check-in/Check-out Date, and Issue Severity.
    b. Modify the ticket form layout to include these custom fields.
9. Set Up Communication Channels
    a. Configure email aliases to convert incoming emails into tickets. For example, emails sent to maintenance@yourhotel.com can create maintenance tickets automatically.
10. Enable the customer portal for guests to submit tickets, track their status, and communicate with hotel staff.
11. Create and Manage Tickets
    a. Guests can create tickets through the customer portal, email, or by calling the front desk (staff can then create tickets on their behalf).
    b. Staff can create tickets manually through the Helpdesk dashboard by clicking the NEW button.
    c. Assign tickets to appropriate teams or agents and update the ticket status as it progresses.

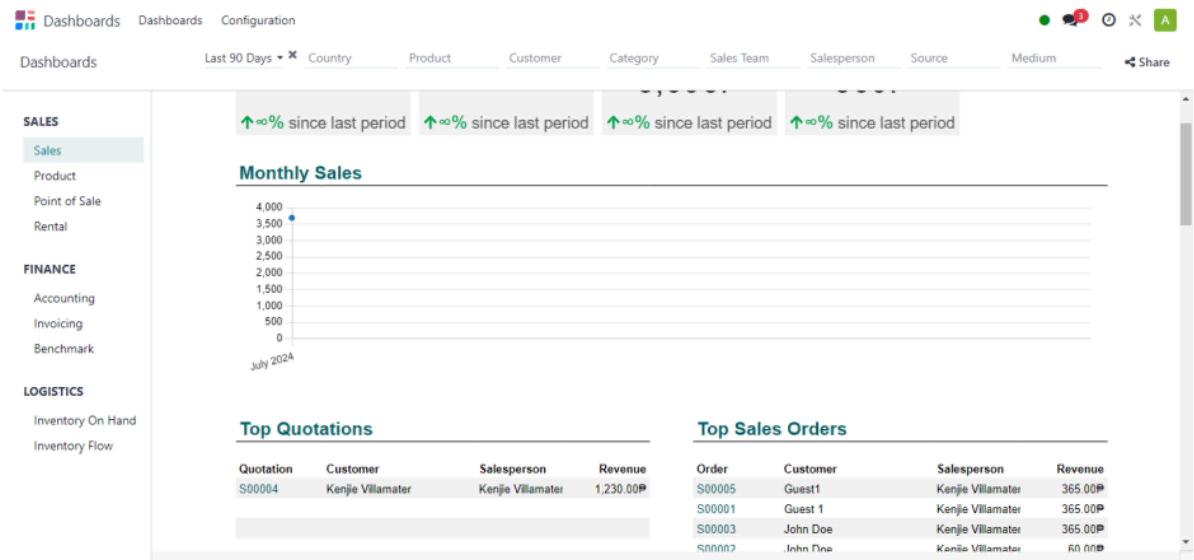
12. Create and manage articles to help staff resolve common issues quickly. Organize articles by categories such as Room Maintenance, Guest Services, and Billing Issues.

13. Generate Reports: Go to Reporting > Helpdesk to access predefined reports on ticket metrics such as ticket volume, response times, and resolution times. Analyze data to identify trends and areas for improvement.





Front Office Reports



From Dashboard select Dashboards. To see the sales, Finance, and logistics

D. Customizing ODOO for Hotel Front Desk Operations

Tailoring the system to handle specific needs such as guest inquiries, reservation issues, room service requests, and other front desk activities.

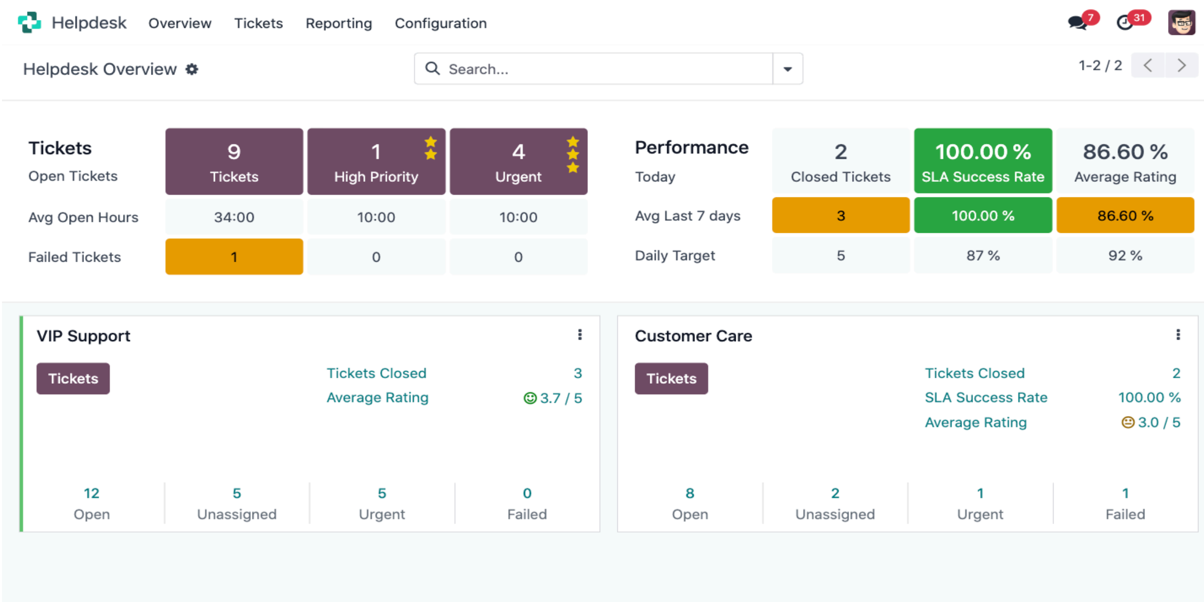
1. Configure Basic Settings - Enable necessary features such as the customer portal and email aliases.
2. Create teams such as Front Desk Support, Housekeeping, and Maintenance.
3. Assign Members - Add front desk staff members to the Front Desk Support team.
4. Create ticket types relevant to front desk operations, such as Guest Inquiry, Reservation Issue, Room Service Request, and Billing Question.

5. Define ticket categories such as Room Issues, Facility Issues, and Guest Services.
6. Customize Ticket Forms and Fields
    a. Go to Odoo Studio to customize the ticket form
    b. Add custom fields relevant to front desk operations
        i. Room Number: To specify the guest's room
        ii. Guest Name: To identify the guest.
        iii. Check-in/Check-out Date: To provide context on the guest's stay.
        iv. Issue Severity: To prioritize tickets based on the severity of the issue.
7. Create rules to automate tasks like ticket assignment, sending notifications, and updating ticket statuses
8. Define SLAs for different ticket types to ensure timely responses and resolutions. For example, a high-priority room service request might have a 30-minute response time SLA.
9. Configure email aliases to convert incoming emails into tickets. For example, emails sent to frontdesk@yourhotel.com can create front desk support tickets automatically.
10. Enable the customer portal for guests to submit tickets, track their status, and communicate with front desk staff.
11. Guests can create tickets through the customer portal, email, or by calling the front desk (staff can then create tickets on their behalf)

Customizing Odoo Helpdesk for hotel front desk operations can streamline the management of guest inquiries, service requests, and other front desk activities, ensuring a high level of guest satisfaction and efficient operations.

III. Front desk features of ODOO System

Odoo offers a variety of features specifically tailored for front desk operations in the hospitality industry. These features help manage guest interactions, streamline check-in and check-out processes, handle reservations, and address guest inquiries and requests efficiently.



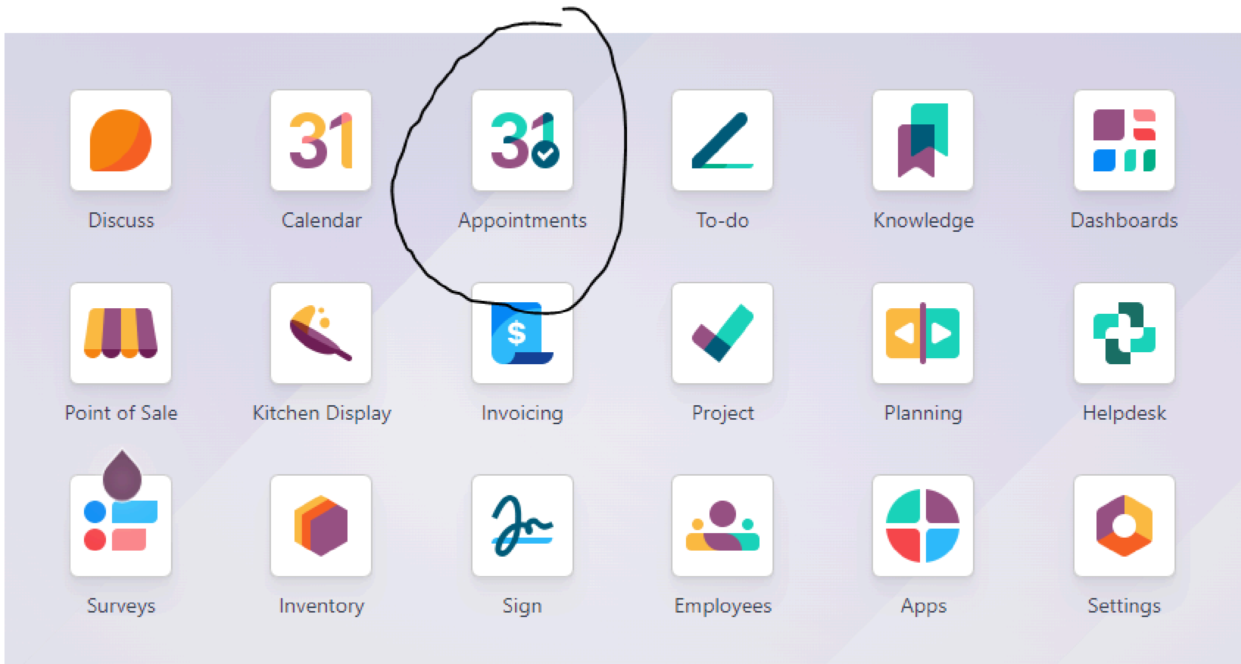
A. Guest Reservations and Front Desk Operations

1. Reservation Management

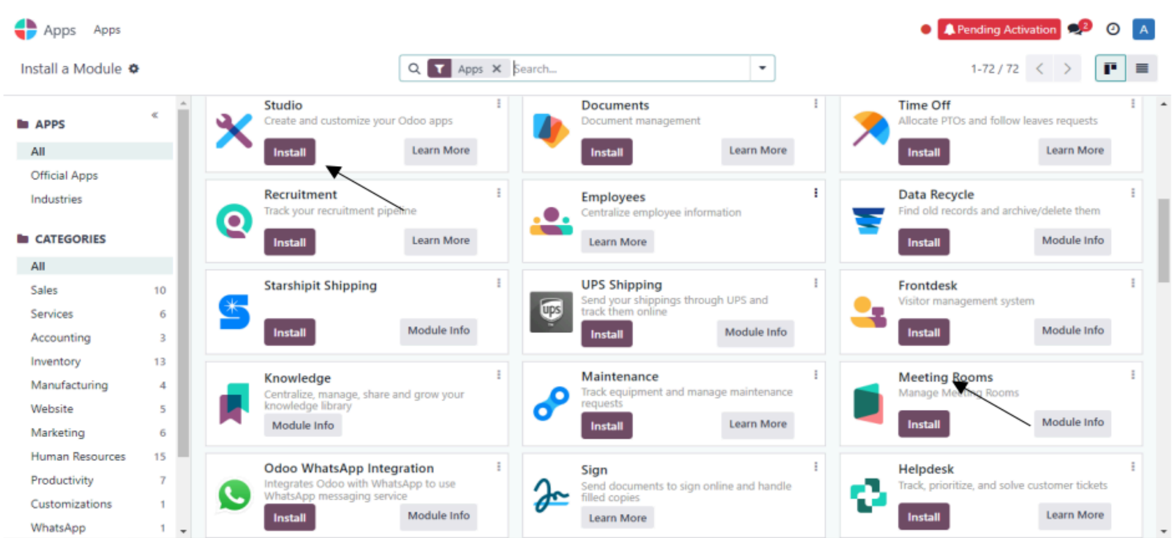
Booking and Reservations:

- Reservation Scheduling: Manage room bookings, availability, and scheduling.
- Reservation Details: Capture guest information, stay dates, room preferences, and special requests.
- Booking Modifications: Easily modify or cancel reservations as needed.

Using the Odoo **"Appointments"** feature for hotel booking reservations can be an effective way to manage room bookings, especially if you are using a standard appointment scheduling system and want to adapt it for hotel reservations.



Select Apps > Install Frontdesk and Studio

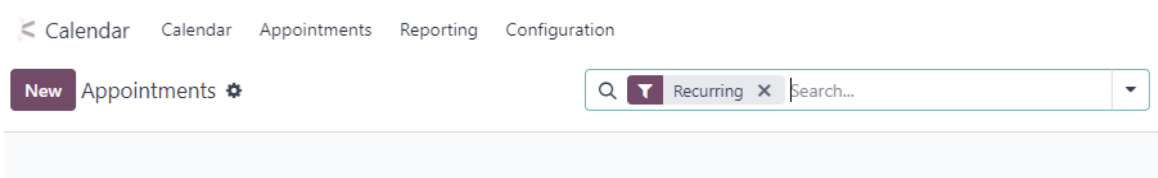


- **Configure Appointment Settings**:
  - Go to the "Appointments" or "Calendar" module from the dashboard.
  - Access the settings by clicking on "Configuration" or "Settings."
  - Configure general settings, such as time slots, appointment types, and business hours.

- **Set Up Appointment Types for Hotel Reservations**

  Create Appointment Types:

- In the "Appointments" module, click "New" to set up a new appointment type that will represent different types of room bookings (e.g., "Single



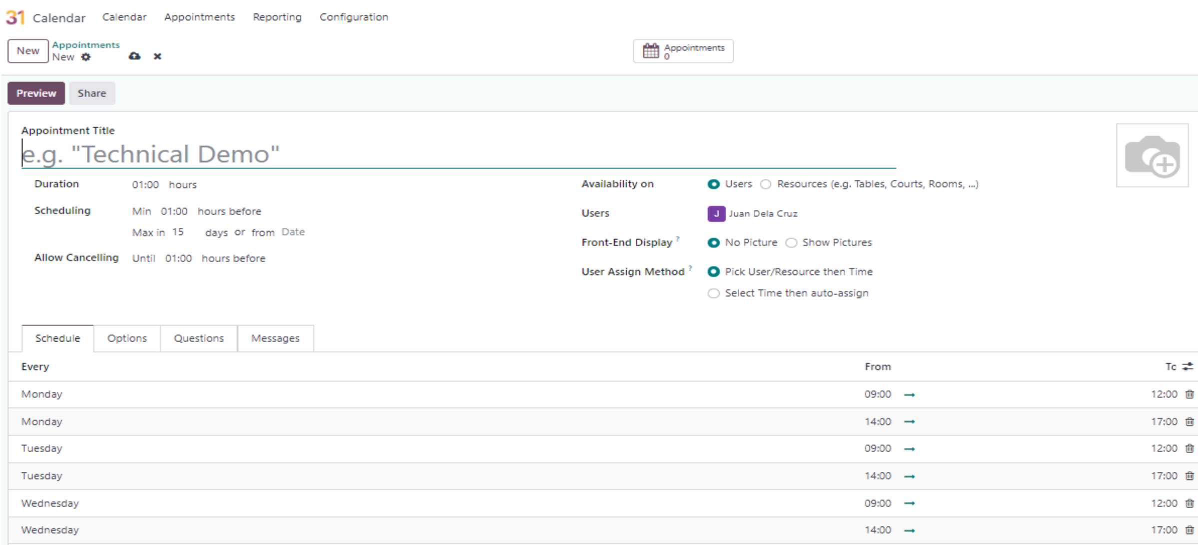
Room," "Double Room," "Suite").

Define Appointment Details:

- Enter the name of the appointment type, which can correspond to different room types
- Set up the duration and any specific details related to the room booking.
- Define availability, pricing, and any additional services or features associated with each room type.

Manage and Schedule Appointments

- Create a New Appointment: Navigate to the "Appointments" menu.
- Click "Create" to start a new appointment.
- Enter the guest's details, such as name and contact information.
- Select the appointment type corresponding to the room type.
- Choose the date and time for check-in and check-out.
- Add any special requests or additional notes.

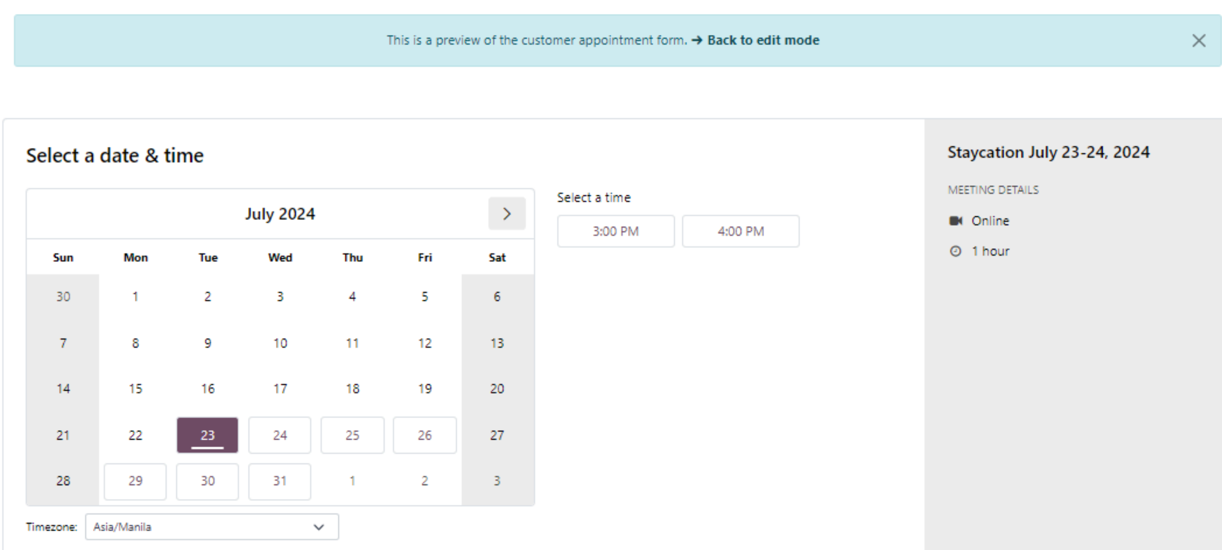


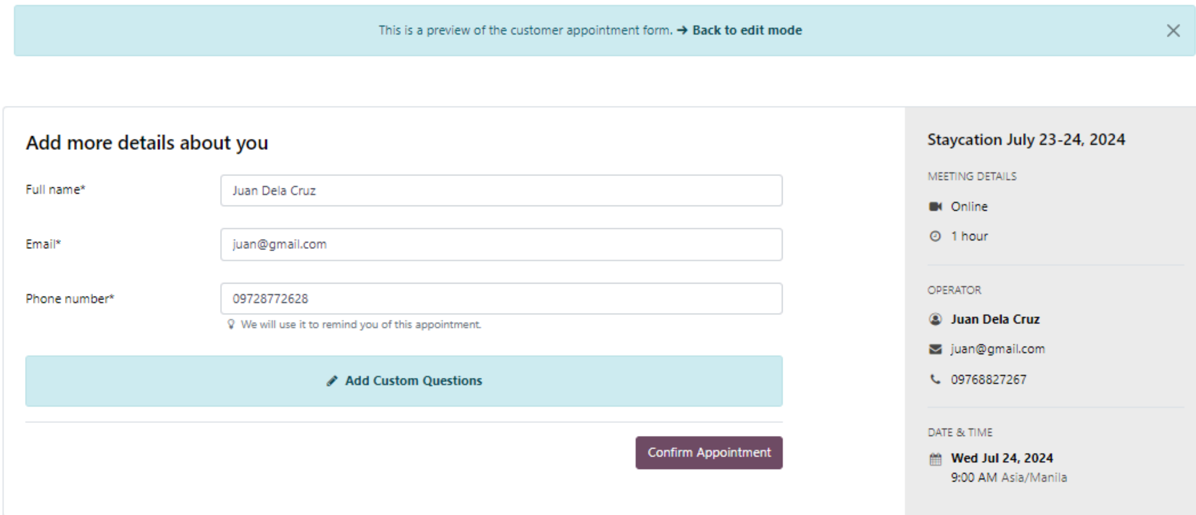
Check Availability:

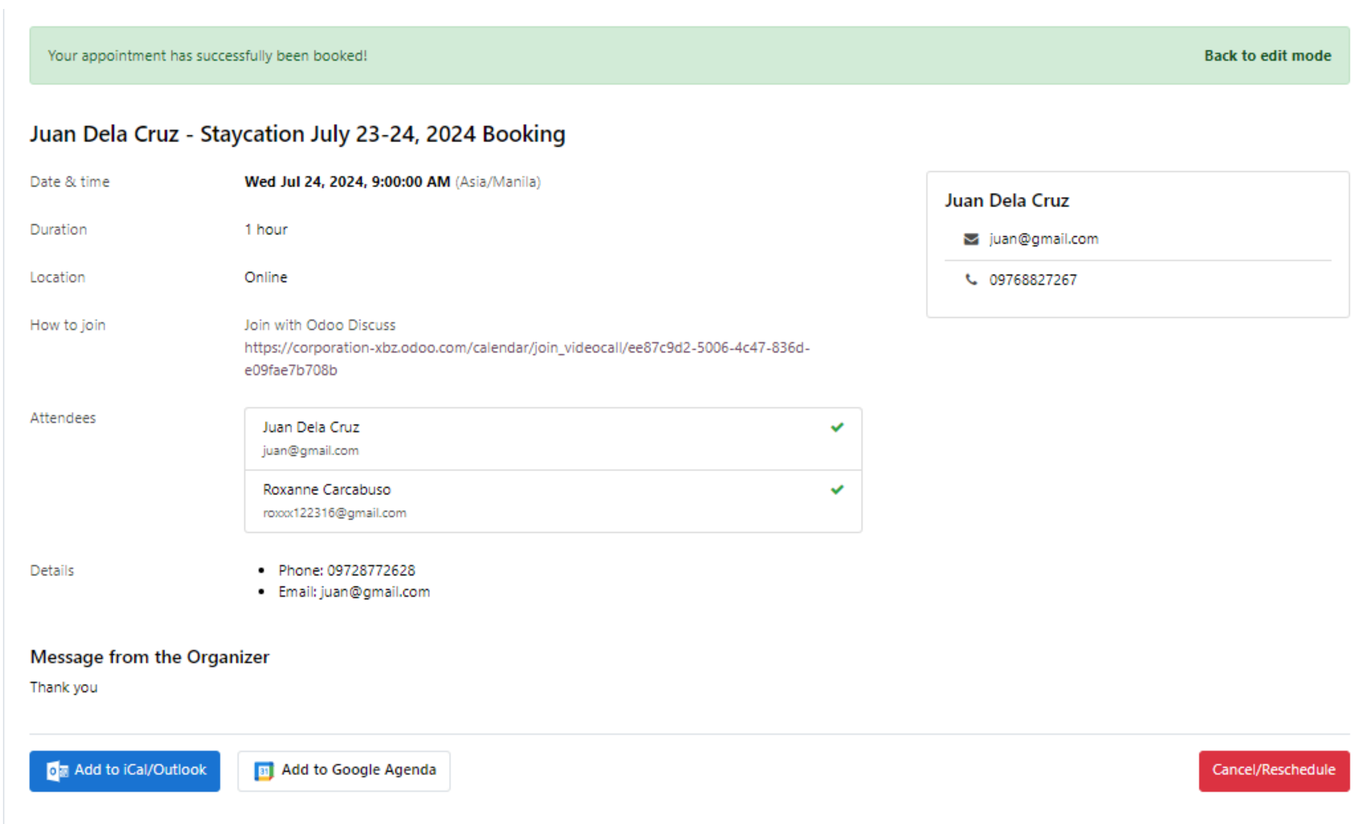
- Ensure that the selected room or appointment type is available for the chosen dates and times.
- The system should reflect availability in real-time based on the configuration of appointment types.

Confirm the Appointment:

- Once all details are entered and availability is confirmed, click "Confirm" to finalize the reservation.
- The appointment will be scheduled, and the guest will receive a confirmation.



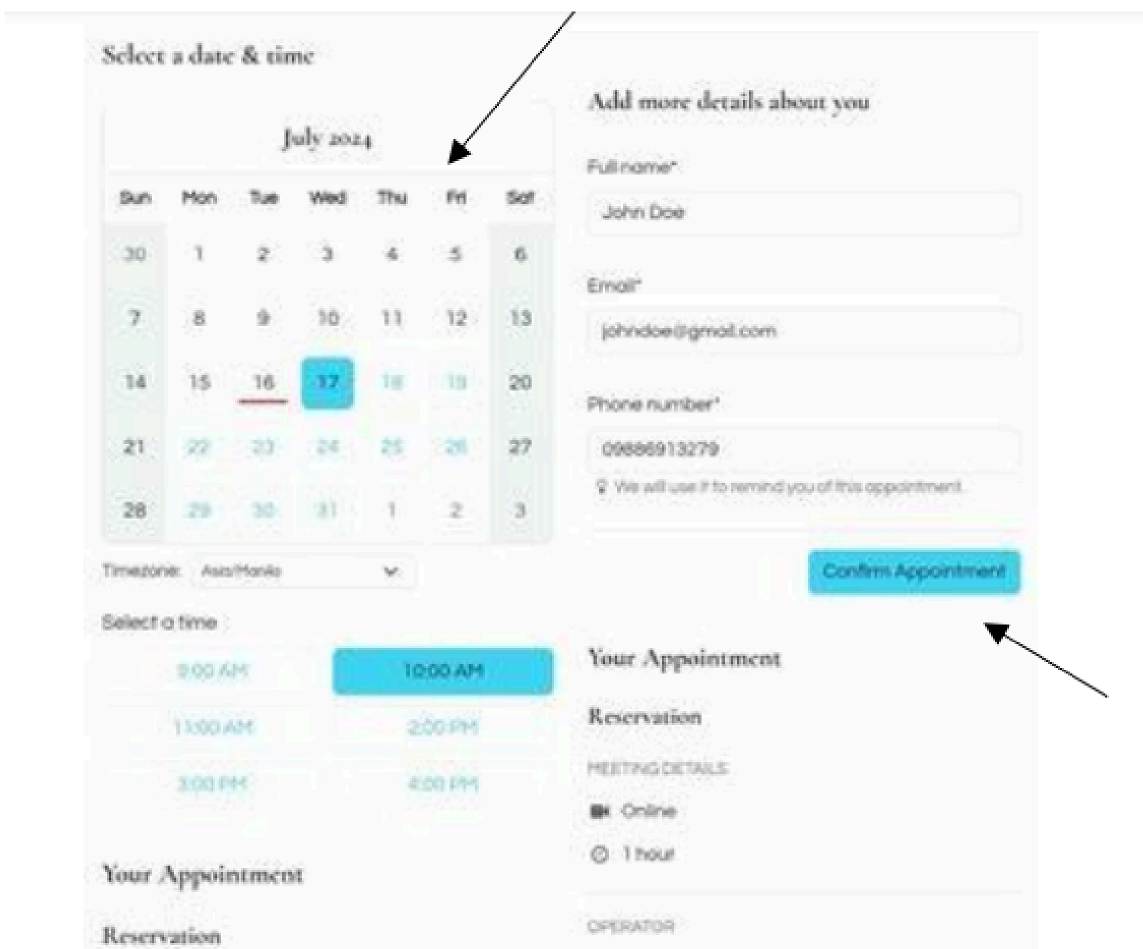


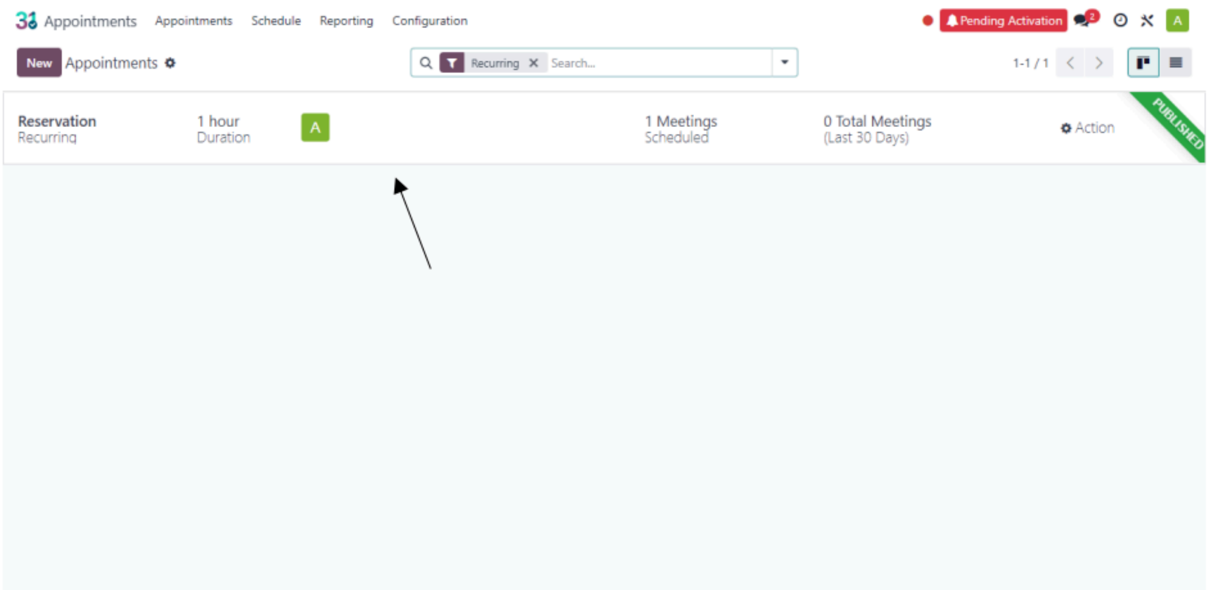


2. Guest Check-In and Check-Out

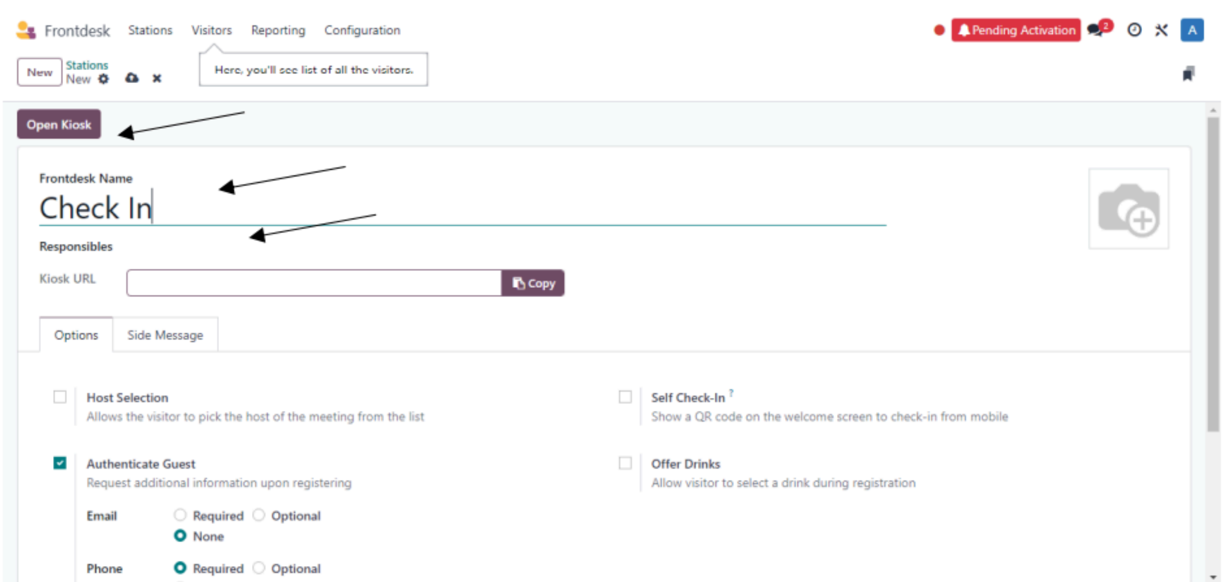
Check-In Process:

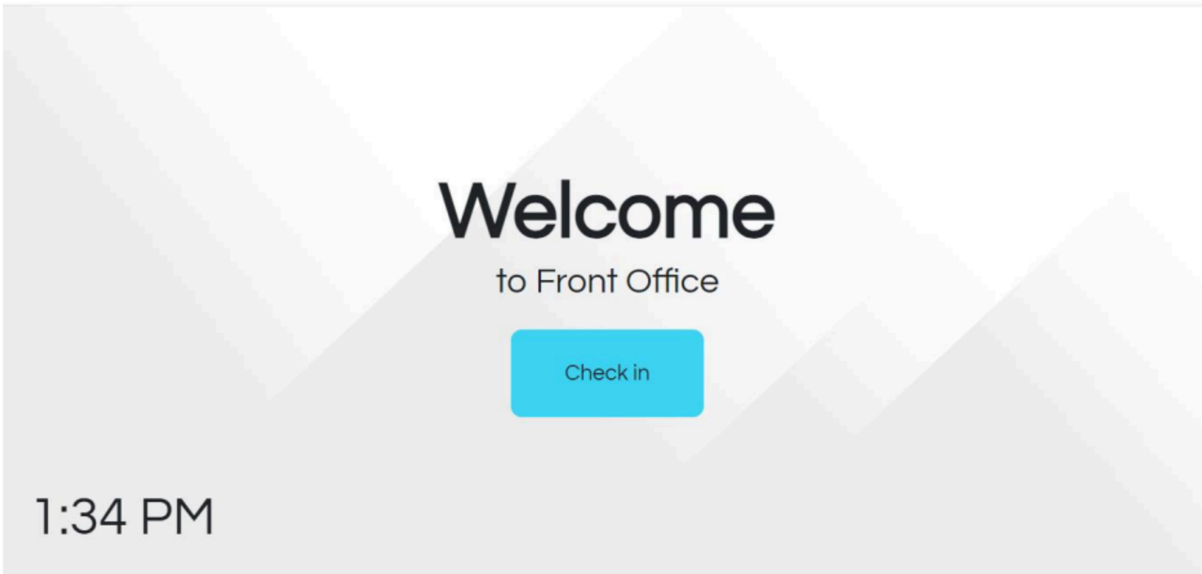
- Guest Registration: Collect guest information, verify identification, and complete registration.
- Room Assignment: Assign rooms based on availability and guest preferences.
- Payment Processing: Handle payments for room charges and deposits during check-in.
- **PRE ARRIVAL**
    - Inividual Reservation thru phone, from the website go to Appointment, fill out all information (name, date, etc), and click **CONFIRM APPOINTMENT.**



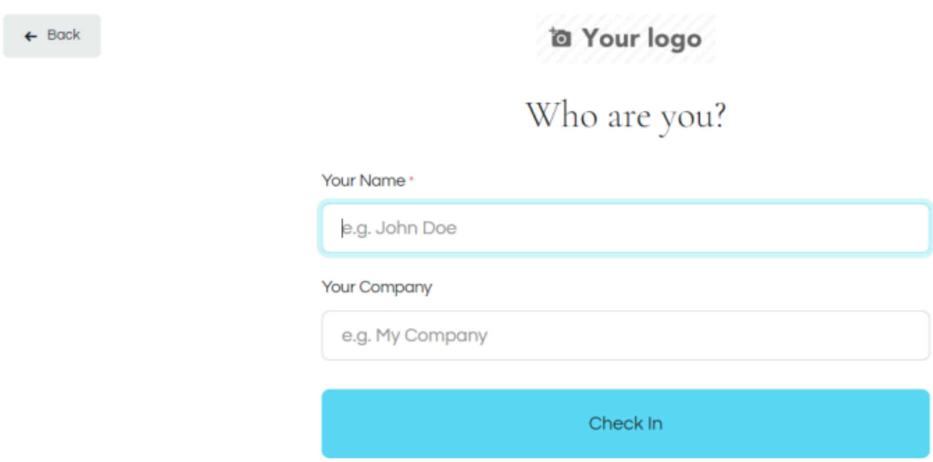


- **ARRIVAL -** from Dashboard click Frontdesk > New > Name the Frontdesk, Select Employee Responsible and Click **Open Kiosk.**





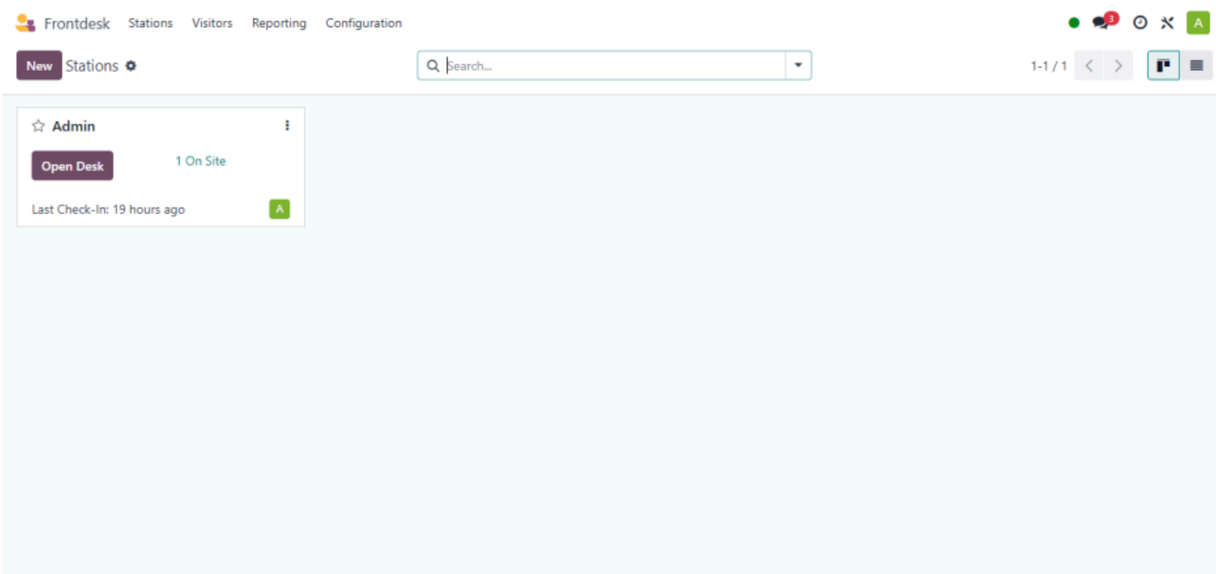
Another window will open and will show this Welcome to Front Office then click **"CHECK IN"**

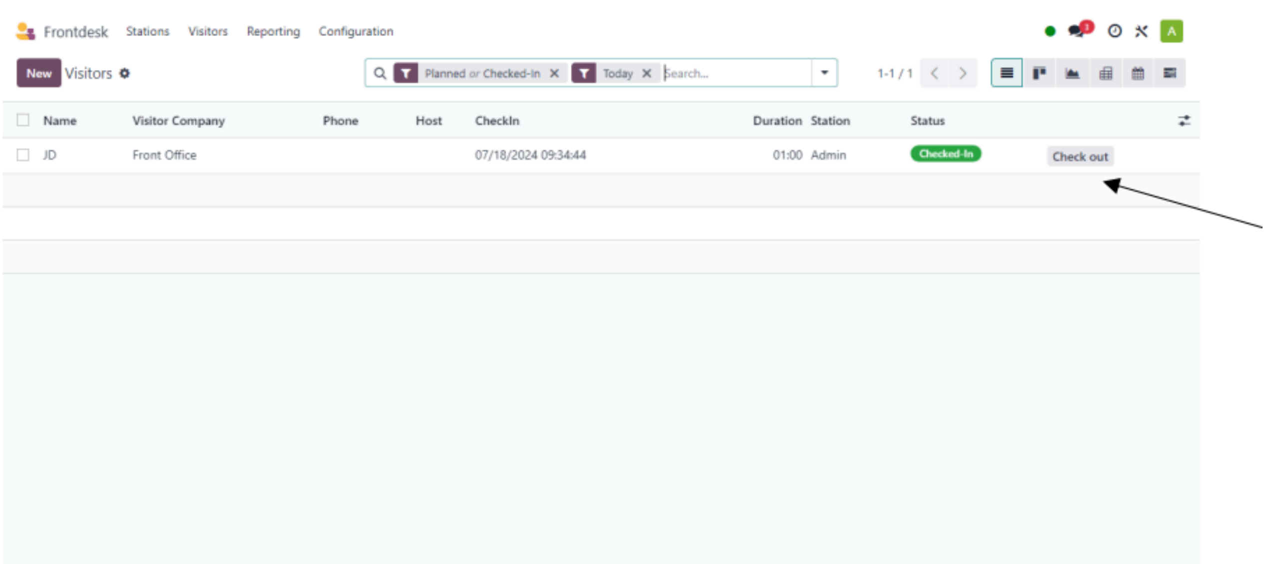


Fill in all information needed, and guest is aready checked in.

Check-Out Process:

- Billing and Invoicing: Generate final invoices, including room charges, additional services, and any applicable taxes.
- Payment Collection: Process payments for the final bill and handle any refunds.
- Feedback Collection: Gather guest feedback and reviews during check-out to improve services.





To Check-out in-house guest: Click Visitors at the top or click the station > Select Visitor/Guest Name > Click Check out beside the status Checked In to check out the guest.

3. **Guest Services Management**

   Service Requests:

   - Ticketing System: Use the Helpdesk module to manage guest service requests, such as room service, housekeeping, and maintenance.
   - Priority Management: Assign priorities to service requests to ensure timely resolution of urgent issues.
   - Service Tracking: Monitor the status of service requests and ensure they are addressed promptly.

   Concierge Services:

   - Activity Booking: Assist guests with booking activities, tours, and transportation.
   - Local Information: Provide guests with information about local attractions, dining options, and events.

4. **Communication and Collaboration**

   Internal Collaboration:

   - Internal Notes: Use internal notes to facilitate communication among front desk staff.
   - Mentions: Mention colleagues using @ followed by their name to notify them of specific tasks or updates.

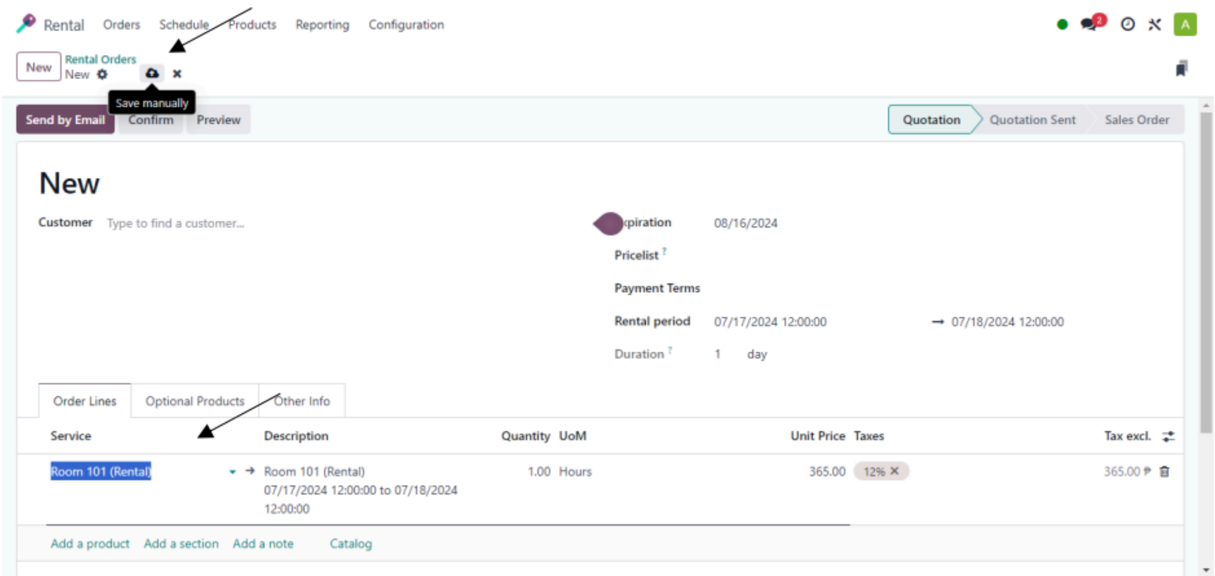
5. **Guest Communication:**
   - Email Integration: Manage guest communications via email directly within the system.
   - Customer Portal: Enable guests to communicate with the front desk, track service requests, and update their information through a self-service portal.

B. Billing and Payments

1. **Room Charges and Additional Services**

Automated Room Charges:

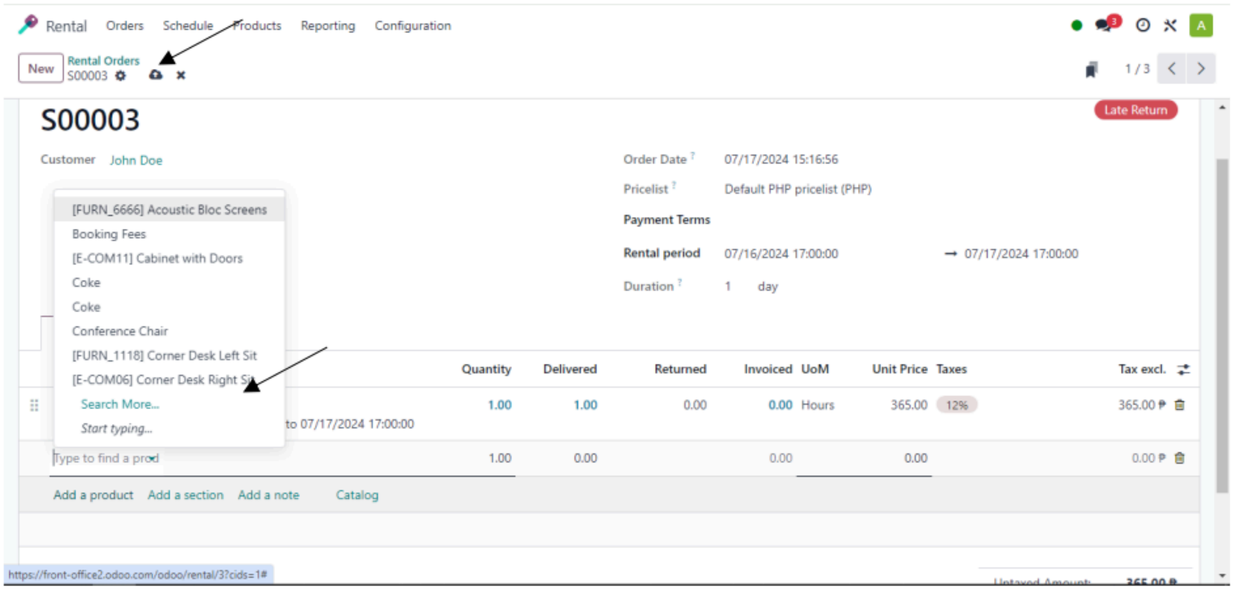
- Daily Rate Application: Automatically apply room charges based on the guest's stay duration and room rate.
- Rate Adjustments: Adjust rates for specific dates or special circumstances, such as peak seasons or long-term stays.

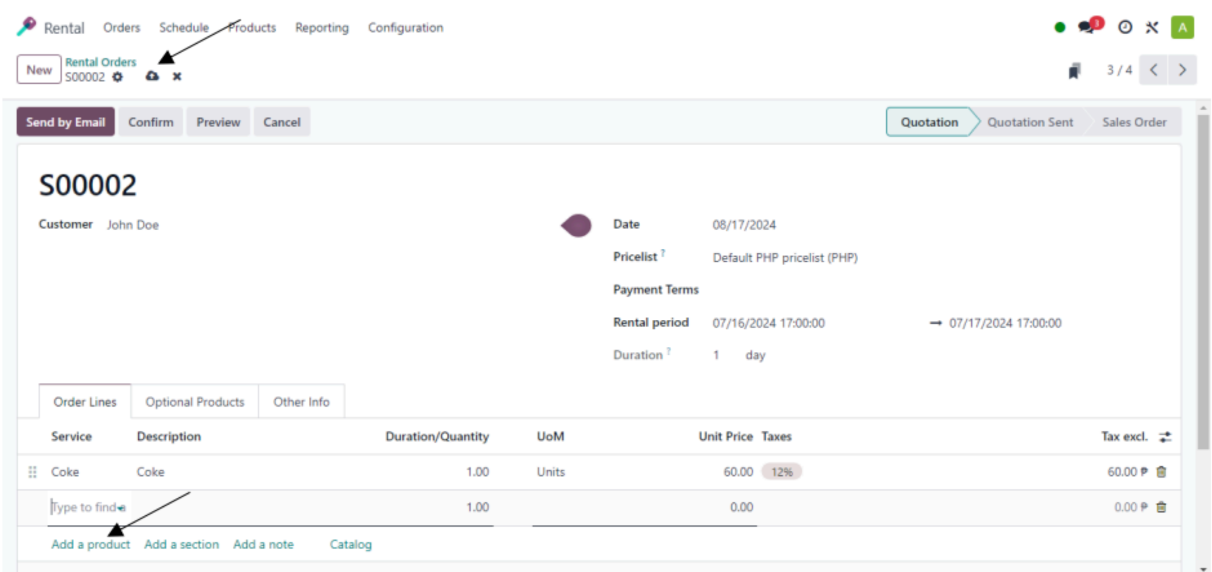


From the home screen click Rental button > Guest List > Select Guest > Click add product > click the cloud to save

Additional Services:

- Service Charges: Add charges for extra services such as room service, minibar, laundry, spa, and transportation.
- Package Deals: Offer and manage package deals that include room rates and additional services.
- From the home screen click Rental button > Guest List > Select Guest > Click add a product > Scroll for additional product click the cloud to save

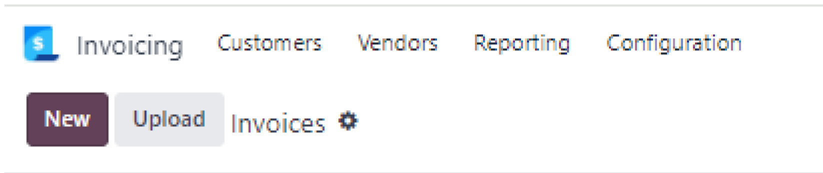


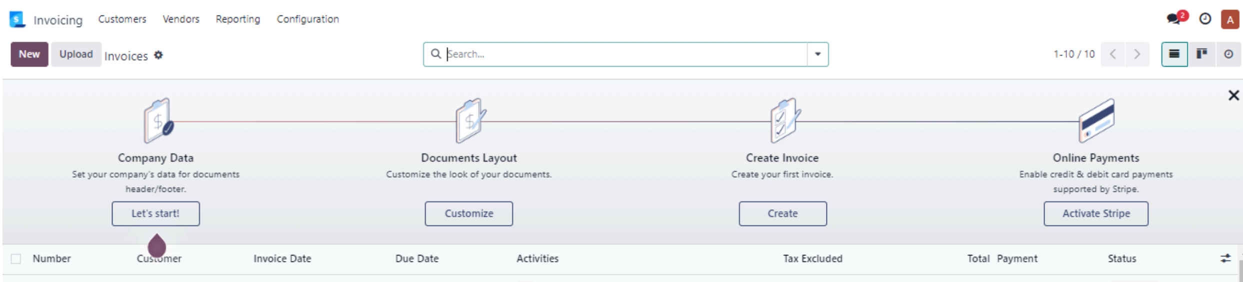


2. Invoicing

Invoice Generation:

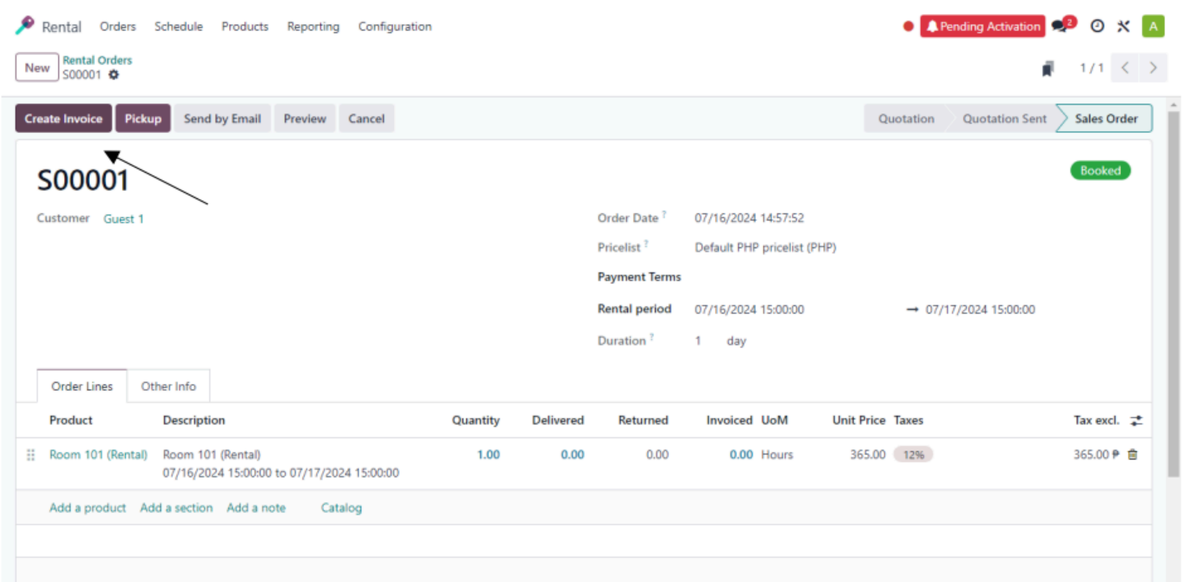
- Automated Invoicing: Generate invoices automatically based on the guest’s booking and additional services used during their stay.
- Customizable Invoice Templates: Customize invoice templates to include hotel branding, itemized charges, and detailed descriptions.



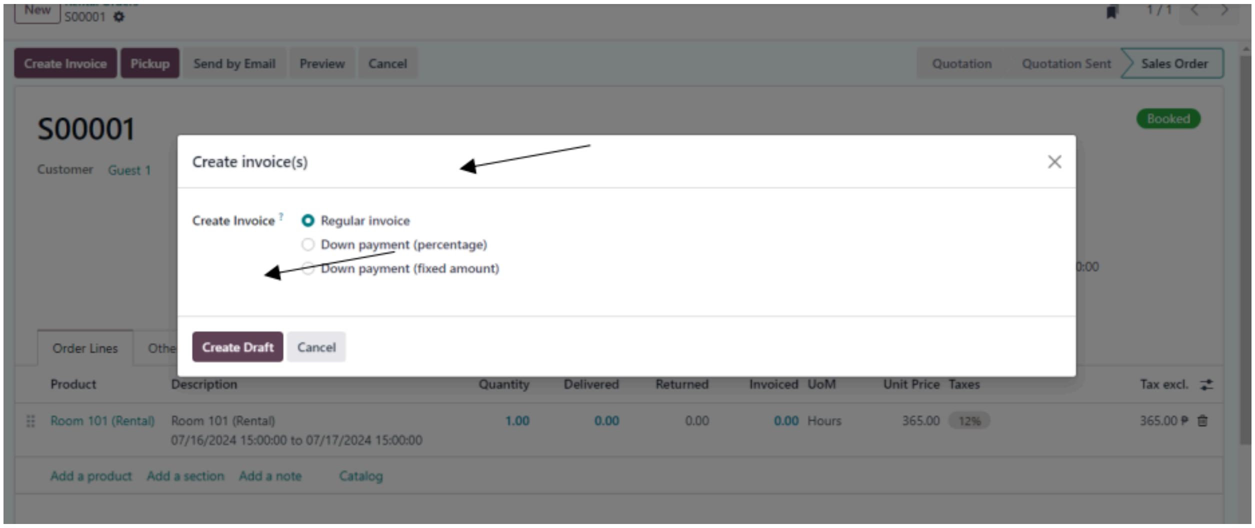


Billing Cycles:

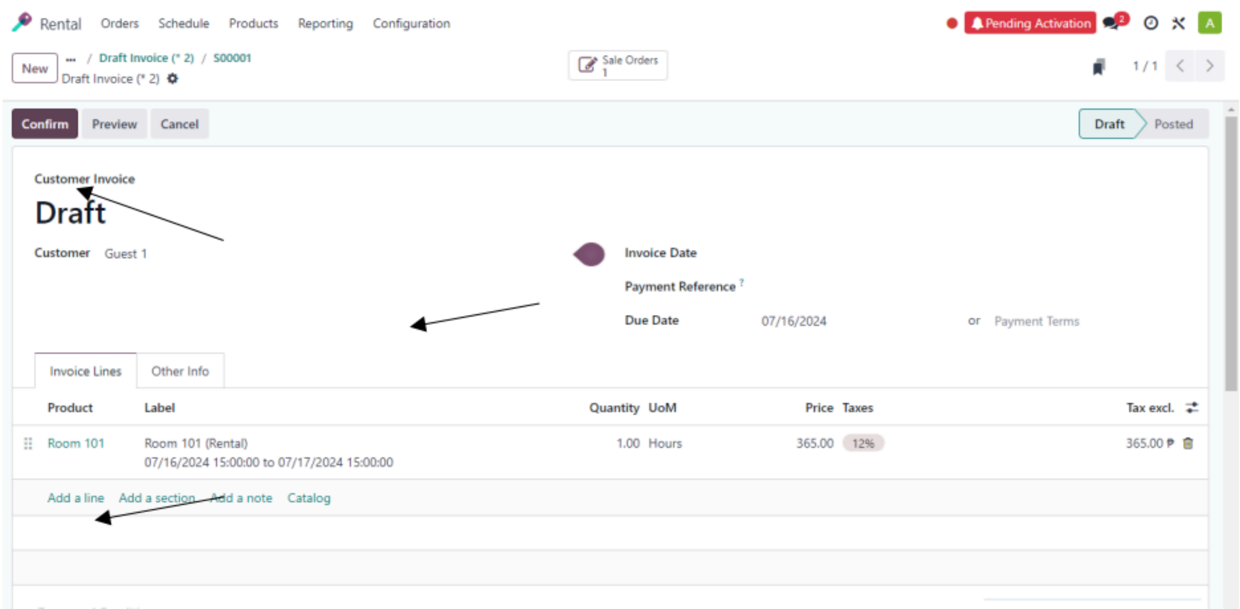
- Periodic Billing: Set up periodic billing for long-term stays, generating invoices at regular intervals (e.g., weekly or monthly).



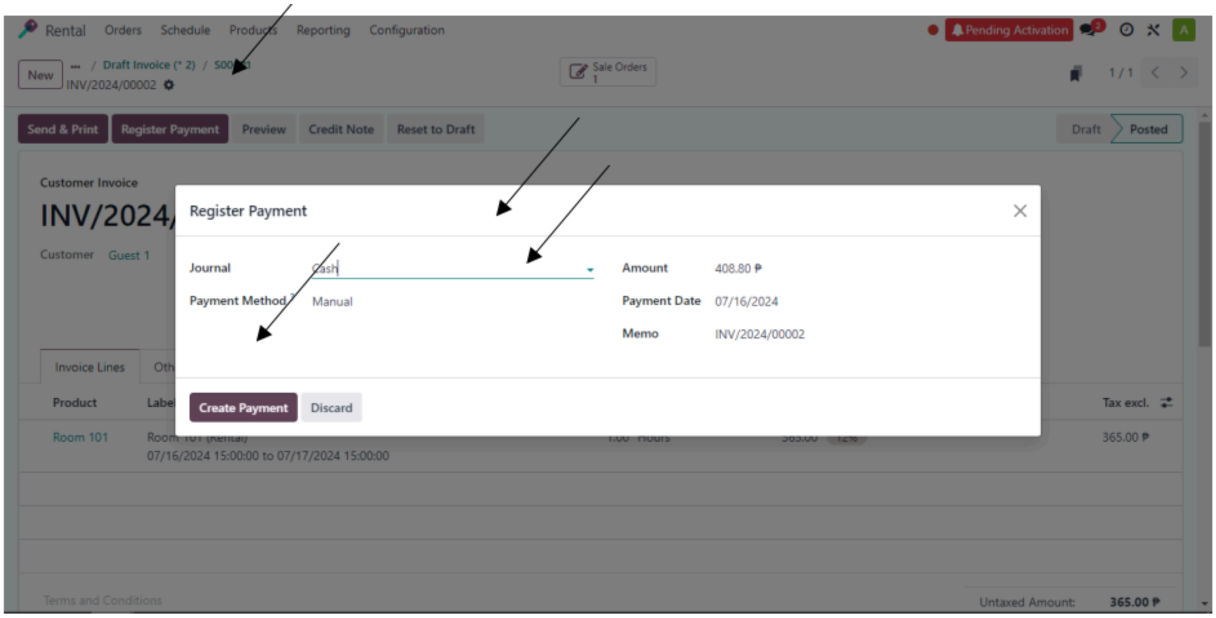
In billing a Guest : From the home screen click Rental button > Create Invoice > Regular Invoice > Create draft

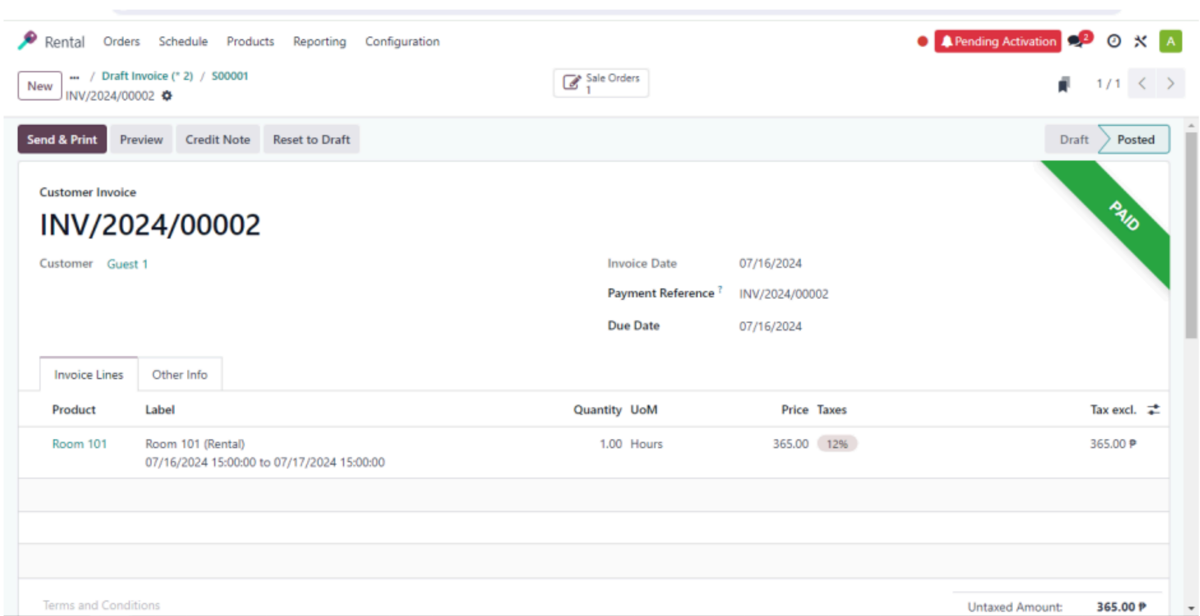


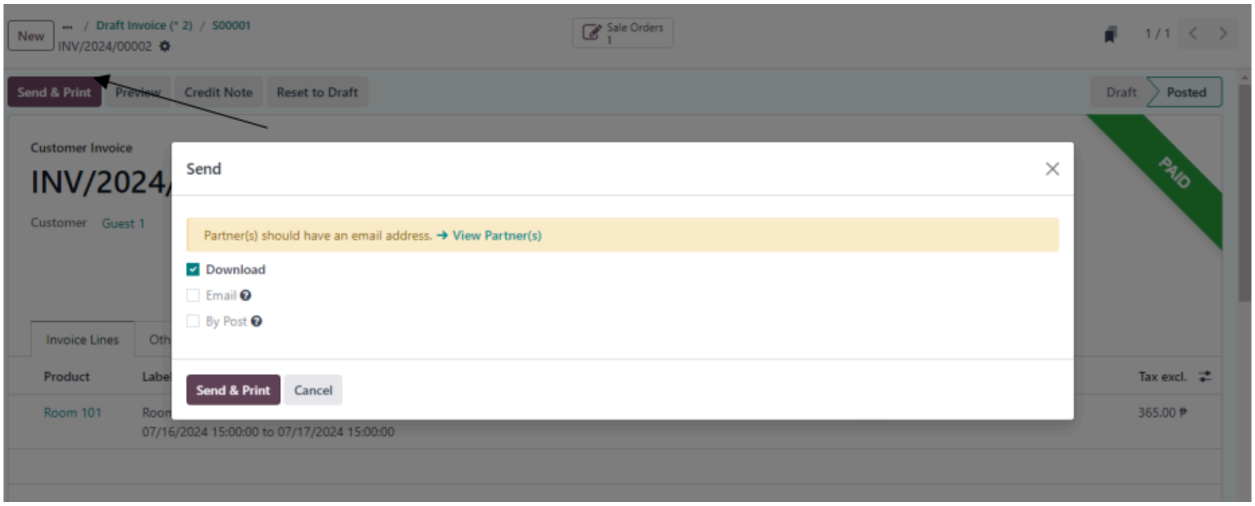
Select the customer > select a product by add a line and click confirm



Click Register Payment > on Journal you can change the type of payment select Manual on payment Method. Then Click create Payment.


Rental
Orders
Schedule
Products
Reporting
Configuration
Pending Activation
New
Draft Invoice (* 2) / S00001
INV/2024/00002
Sale Orders 1
1 / 1
Send & Print
Register Payment
Preview
Credit Note
Reset to Draft
Draft
Posted
Customer Invoice
Customer Guest 1
Register Payment
Journal
Cash
Payment Method
Manual
Amount
408.80 ₱
Payment Date
07/16/2024
Memo
INV/2024/00002
Create Payment
Discard
Invoice Lines
Product
Tax excl.
Room 101
07/16/2024 15:00:00 to 07/17/2024 15:00:00
365.00 ₱
Terms and Conditions
Untaxed Amount:
365.00 ₱


Rental
Orders
Schedule
Products
Reporting
Configuration
Pending Activation
New
Draft Invoice (* 2) / S00001
INV/2024/00002
Sale Orders 1
1 / 1
Send & Print
Preview
Credit Note
Reset to Draft
Draft
Posted
PAID
Customer Invoice
INV/2024/00002
Customer Guest 1
Invoice Date 07/16/2024
Payment Reference INV/2024/00002
Due Date 07/16/2024
Invoice Lines
Other Info
Product
Label
Quantity
UoM
Price
Taxes
Tax excl.
Room 101
Room 101 (Rental)
07/16/2024 15:00:00 to 07/17/2024 15:00:00
1.00
Hours
365.00
12%
365.00 ₱
Terms and Conditions
Untaxed Amount:
365.00 ₱



3. **Payment Processing**

   Multiple Payment Methods:

   - Credit/Debit Cards: Accept payments via credit and debit cards, with integration to various payment gateways.
   - Cash Payments: Process cash payments and provide receipts.
   - Online Payments: Facilitate online payments through secure payment gateways.

4. **Payment Collection:**
   - Pre-Authorization: Pre-authorize credit cards during check-in to guarantee payment.
   - Deposit Handling: Manage deposits for reservations and refund or apply them to the final bill during check-out.
   - Split Payments: Handle split payments where guests prefer to pay using multiple methods or share the bill.

5. **Discounts and Offers**

   Promotional Discounts:

   - Discount Codes: Apply discount codes or coupons to reduce the total bill amount.
   - Special Offers: Create and manage special offers, such as early bird discounts, last-minute deals, or loyalty rewards.

Custom Discounts:

- Manual Adjustments: Apply manual discounts at the front desk for specific situations or guest satisfaction purposes.

C. Housekeeping and Maintenance Management

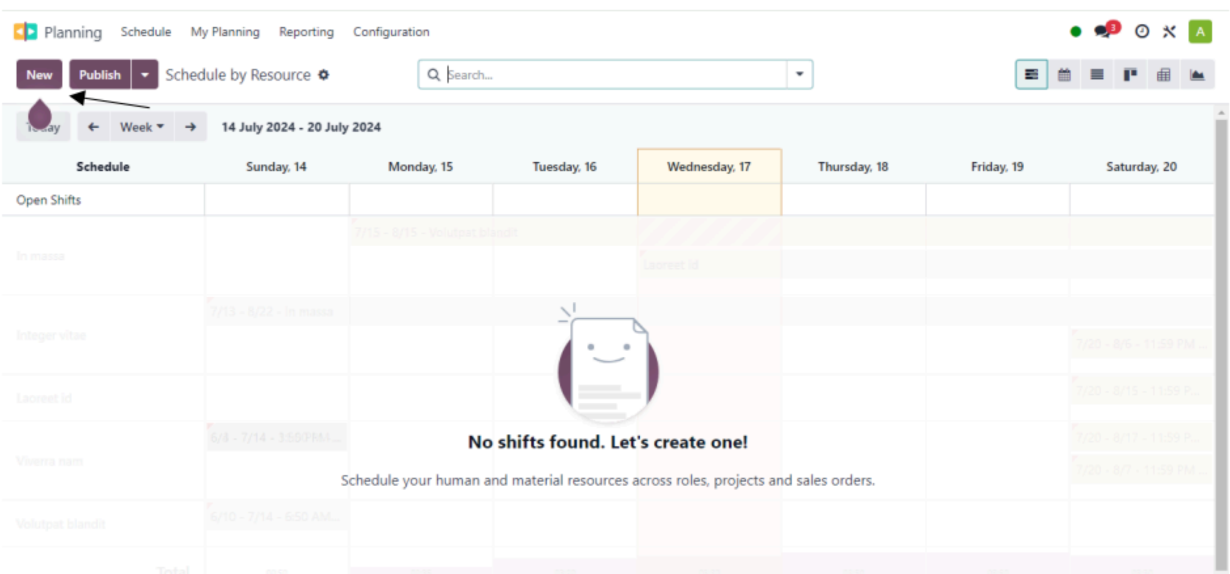
Odoo provides a robust set of features for managing housekeeping and maintenance operations in the hospitality industry. These features are designed to streamline the management of room cleaning, maintenance requests, and other operational tasks at the front desk.

- **Housekeeping Management**

1. Housekeeping Tasks and Schedules

Task Assignment:

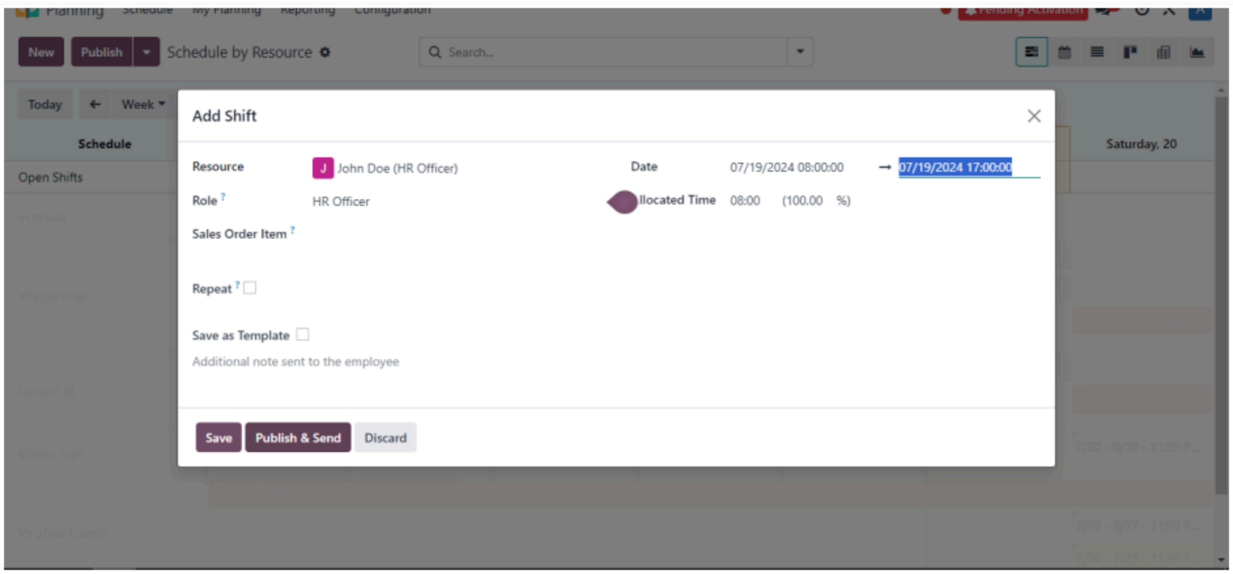
- Create Tasks: Generate housekeeping tasks for daily, weekly, or special cleaning requirements.
- Assign Tasks: Assign tasks to housekeeping staff or teams based on their schedules and room assignments.

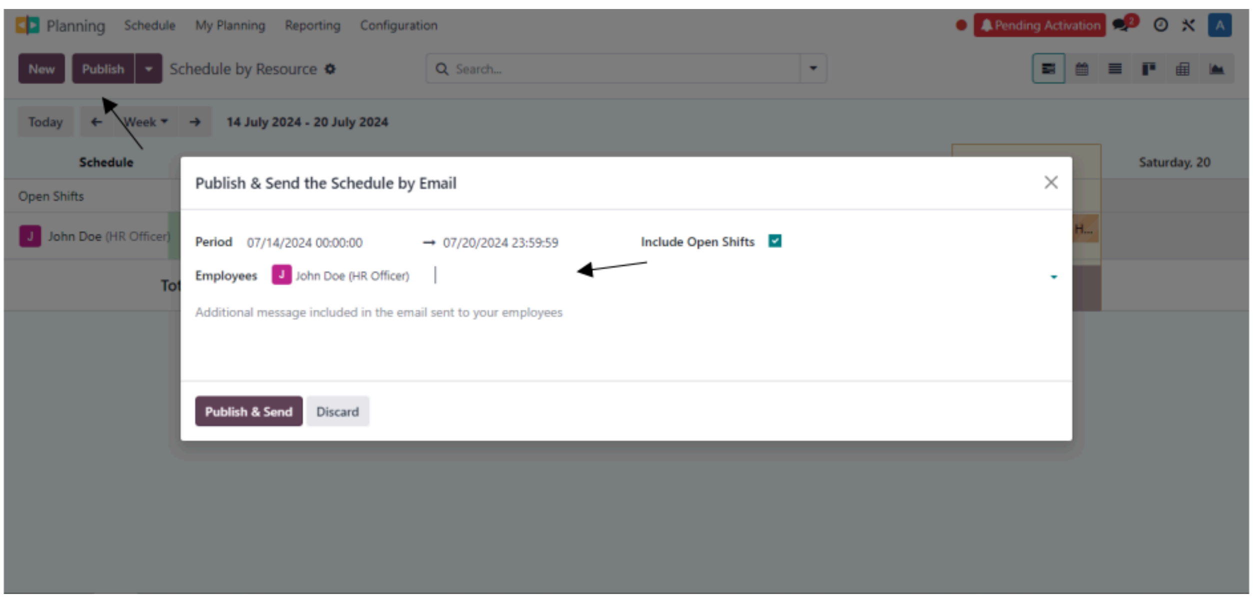


Task Scheduling:

- Recurring Schedules: Set up recurring schedules for regular cleaning tasks, such as daily room cleaning and weekly deep cleaning.

- Shift Management: Manage shifts and allocate housekeeping staff based on peak times and room occupancy.





Task Tracking:

- Real-Time Updates: Track the status of housekeeping tasks in real-time using the Odoo dashboard.

- Completion Status: Update the status of tasks as they are completed and provide feedback if necessary.

2. Room Status Management

Room Status Tracking:

- Current Status: Monitor the status of rooms, such as clean, dirty, under maintenance, or occupied.
- Room Availability: Update room availability based on cleaning status to ensure accurate room assignments for guests.

Check-In/Check-Out Coordination:

- Pre-Check-In Preparation: Ensure rooms are cleaned and prepared before guest check-ins.
- Post-Check-Out Cleaning: Schedule cleaning tasks immediately after check-out to prepare rooms for new guests.

- **Maintenance Management**

1. Maintenance Requests

Request Creation:

- Ticket System: Use the Helpdesk module to create maintenance tickets for issues reported by guests or discovered by staff.
- Request Categories: Categorize maintenance requests into types such as plumbing, electrical, HVAC, or general repairs.

Request Assignment:

- Team Assignment: Assign maintenance requests to appropriate maintenance teams or technicians based on expertise and availability.
- Priority Management: Set priority levels for maintenance requests to address urgent issues promptly.

2. **Maintenance Scheduling and Tracking**

Task Scheduling:

- Preventive Maintenance: Schedule regular preventive maintenance tasks to avoid equipment failures and extend the lifespan of hotel assets.
- Reactive Maintenance: Manage reactive maintenance tasks based on incoming requests and reported issues.

Tracking and Updates:

- Real-Time Tracking: Track the status of maintenance requests and update their progress in real-time.
- Completion and Feedback: Update the request status upon completion and gather feedback from the requester if necessary.

D. TICKET MANAGEMENT

Ticket management is a crucial feature for front desk operations in the hospitality industry, as it helps handle guest inquiries, service requests, and issues efficiently. Odoo’s Helpdesk module is designed to streamline this process, offering a range of functionalities to improve how front desk staff manage and resolve tickets.

1. Ticket Creation

Manual Ticket Creation

- Create Tickets Directly: Front desk staff can manually create tickets for guest requests or issues directly from the Helpdesk module by clicking the Create button.
- Form Fields: Enter essential details such as ticket type, description, priority, and assigned team or agent. Include guest information like room number and special requests.

Automated Ticket Creation

- Email Integration: Configure email aliases to automatically convert incoming emails into tickets. For example, emails sent to frontdesk@yourhotel.com can be turned into support tickets.
- Customer Portal: Allow guests to submit tickets through a self-service portal, where they can report issues, request services, and track the status of their requests.

2. Ticket Assignment and Routing

Team Assignment

- Assign to Teams: Tickets can be assigned to specific helpdesk teams based on the type of request or issue (e.g., Front Desk Support, Housekeeping, Maintenance).
- Automated Assignment: Set up rules to automatically assign tickets to appropriate teams or agents based on predefined criteria such as ticket type or priority.

Agent Assignment

- Manual Assignment: Front desk staff can manually assign tickets to individual agents based on their expertise and availability.
- Automated Routing: Use automated rules to route tickets to the appropriate agent based on factors such as workload or specific skills.

3. Ticket Prioritization and Categorization

Ticket Prioritization

- Priority Levels: Set priority levels (e.g., Low, Medium, High) for each ticket to ensure urgent issues are addressed promptly.
- SLA Management: Define Service Level Agreements (SLAs) to set response and resolution times based on ticket priority.

Ticket Categorization

- Types and Categories: Categorize tickets by type (e.g., Room Service Request, Billing Inquiry, Maintenance Issue) and by subcategories to facilitate organization and reporting.
- Custom Tags: Use custom tags to further classify and filter tickets based on specific needs or attributes.

4. Ticket Status and Workflow

Ticket Status Tracking

- Status Stages: Track tickets through various status stages such as New, In Progress, On Hold, and Closed.
- Status Updates: Update the ticket status as work progresses and communicate changes to relevant parties.

Workflow Automation

- Automated Actions: Set up automated actions for common workflows, such as sending notifications when a ticket is assigned or escalated.

- Escalation Rules: Define rules to escalate tickets that are not resolved within the expected timeframe or require higher-level intervention.

5. Communication and Collaboration

Internal Communication

- Internal Notes: Add internal notes to tickets for communication between staff members. These notes are visible only to the internal team and not to the guest.
- Mentions: Use mentions to notify specific team members or agents about ticket updates or requests.

External Communication

- Guest Communication: Communicate with guests directly through the ticket interface. Send updates, requests for additional information, or resolutions.
- Customer Portal: Enable guests to view the status of their tickets, add comments, and track progress through the customer portal.

6. Ticket Resolution and Closure

Resolution Tracking

- Resolution Details: Document the resolution of each ticket, including actions taken, solutions provided, and any follow-up steps.
- Feedback Collection: Optionally collect feedback from guests on the resolution process and their satisfaction with the service.

Ticket Closure

- Close Tickets: Mark tickets as closed once the issue has been resolved. Ensure all relevant details are recorded and that the guest is satisfied.
- Reopen Tickets: Allow tickets to be reopened if the guest reports that the issue persists or additional work is needed.