



Website Helpdesk Support Ticket and Issue Management

PDF Document Version :

1.0.0

Prepared By :

Probuse Consulting Service Pvt. Ltd.

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www.probuse.com



User Manual (English)

Contents:

1. Website Helpdesk Support Ticket and Issue Management
(website_helpdesk_support_ticket)



❖ Form to Create Support Ticket by Customer Login with Azure Interior, Colleen Diaz [Website]

Login by Customer can See the Create Ticket, Show Ticket and Search Ticket Menu. Click on Create Ticket Menu To open the Create Ticket Form with the customer, email, phone and also see the category of ticket.

Probuse Professional Business

Home **Create Ticket** Show Tickets Search Tickets Contact us

Colleen Diaz Contact Us

Customer
Colleen Diaz

Email
colleen.diaz83@example.com

Phone
(255)-595-8393

Category
Technical

Subject
[Empty input field]

Description
[Empty input field]

Priority
Low

Attach Files
Choose files No file chosen
Multiple files can be attach

Submit



❖ Create Support Ticket by Customer / Portal User Login [Website]

Your customer can send support tickets / support requests from your website and customers can also attach documents / files while creating tickets from the website.

Probuse Professional Business

Home Create Ticket Show Tickets Search Tickets Contact us

Colleen Diaz Contact Us

Customer
Colleen Diaz

Email
colleen.diaz83@example.com

Phone
(255)-595-8393

Category
Technical

Subject
Technical Problems Of Business Intelligence Software

Description
Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view.

Priority
Low

Attach Files
Choose files No file chosen
Multiple files can be attach

Submit



❖ Acknowledgement Thanks Message to Customer [Website]

Generation of a unique support ticket on submission and record it as a helpdesk ticket on the backend side of Odoo on ticket form view.

A screenshot of a website page for Probuse Consulting Service Pvt. Ltd. The page has a header with the Probuse logo, navigation links (Home, Create Ticket, Show Tickets, Search Tickets, Contact us), and user information (Colleen Diaz, Contact Us). The main content features a large teal thumbs-up icon, the text "Thank You!", and a message: "We have received your support ticket request. Your ticket number is TICKET/00022. please note it for further communication and you will also receive email from our support team shortly. Please reply to that email for feature conversation." A "View Ticket" button is visible. A large black redaction box covers the bottom portion of the page content.



❖ Created Helpdesk Ticket Form View [Backend]

Helpdesk Support Ticket will set the Team, Team Leader, Assign to Priority and problem description.

Helpdesk Helpdesk Analytic Account Configuration Invoicing

Mitchell Admin (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

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Set To Close New Assigned Work in Progress Needs More Info Needs Reply Reopened Solution Suggested Closed

Create Invoice Create Task

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Martin Luther	Customer	Azure Interior, Colleen Diaz								
Type of Subject	colleen.diaz83@example.com	Customer Name	Colleen Diaz								
Assign To	Probase Consulting Service Pvt. Ltd.	Phone	(255)-595-8393								
Email		Allow Users									
Company											
Tasks											
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker								
Project		Analytic Account									
Department		Priority	Low								
		Category	Technical								
Create Date	07/06/2021 18:30:19	Close Date									
Is Ticket Closed ?	<input type="checkbox"/>	Total Hours Spent	00:00								
To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.											
<table border="1"> <tbody> <tr> <td>Total Consumed Hours</td> <td>00:00</td> </tr> <tr> <td>Total Purchase Hours</td> <td>00:00</td> </tr> <tr> <td>Remaining Hours</td> <td>00:00</td> </tr> <tr> <td>Balance Remaining Hours</td> <td>00:00</td> </tr> </tbody> </table>				Total Consumed Hours	00:00	Total Purchase Hours	00:00	Remaining Hours	00:00	Balance Remaining Hours	00:00
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Total Purchase Hours	00:00										
Remaining Hours	00:00										
Balance Remaining Hours	00:00										
Description Timesheets Add Invoice Lines General Information Customer Rating											
<div style="border: 1px solid red; padding: 5px;"> Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view. </div>											



❖ Support User can Communicate Customer using Chatter [Backend]

The Support user can assign tickets to the support user, set the Project, Department, Team Leader, Priority and set the Type of Ticket, Type of Subject.

Helpdesk Helpdesk Analytic Account

Martin Luther (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

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New Assigned Work in Progress Needs More Info Needs Reply Reopened Solution Suggested Closed

Tasks Invoice Analytic Account

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz
Type of Subject	Functional Issue	Customer Name	Colleen Diaz
Assign To	Martin Luther	Phone	(255)-595-8393
Email	colleen.diaz83@example.com	Allow Users	(Martin Luther) (Mitchell Admin) (Peter Pinaker)
Tasks	(Technical Problems Of Business In...		
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict
Department	Professional Services	Priority	Low
		Category	Technical
Create Date	07/14/2021 18:30:19	Close Date	07/07/2021 10:56:40
Is Ticket Closed ?	<input type="checkbox"/>	Total Hours Spent	30:00
		To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.	
		Total Consumed Hours	22:00
		Total Purchase Hours	00:00
		Remaining Hours	-22:00
		Balance Remaining Hours	-22:00

Description Timesheets Add Invoice Lines General Information Customer Rating

Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view.

Send message Log note Schedule activity 1 Following 4

To: Followers of "TICKET/00022"

Dear Azure Interior, Colleen Diaz,

We are working on your ticket and we will call you tomorrow for further details about your issue.

Meanwhile if you have any questions you can call us.

Thank you,
Martin

Send



❖ Message sent to Customer from Chatter in the Backend [Backend]

Support User Can send messages to the customer from chatter in the backend. Our team works on your ticket. Customer check status of ticket on my account portal.

Helpdesk Helpdesk Analytic Account

Martin Luther (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

Edit Create Print Action

1 / 1

New Assigned Work in Progress Needs More Info **Needs Reply** Reopened Solution Suggested Closed

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz
Type of Subject	Functional Issue	Customer Name	Colleen Diaz
Assign To	Martin Luther	Phone	(255)-595-8393
Email	colleen.diaz83@example.com	Allow Users	Martin Luther Mitchell Admin Peter Pinaker
Tasks			
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict
Department	Professional Services	Priority	Low
		Category	Technical
Create Date	07/06/2021 18:30:19	Close Date	
Is Ticket Closed ?	<input type="checkbox"/>	Total Hours Spent	30:00
		To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.	
		Total Consumed Hours	222:00
		Total Purchase Hours	00:00
		Remaining Hours	-222:00
		Balance Remaining Hours	-222:00

Description Timesheets Add Invoice Lines General Information Customer Rating

Date	Employee	Project	Helpdesk Support	Billable	Time In	Time Out	Duration (Hours)
07/08/2021	Abigail Peterson	AGR - S00020	TICKET/00022	<input type="checkbox"/>	10:00	20:00	10:00
07/07/2021	Abigail Peterson	Internal Gap Analysis	TICKET/00022	<input type="checkbox"/>	10:00	15:00	05:00
07/06/2021	Abigail Peterson	E-Learning Integration	TICKET/00022	<input type="checkbox"/>	10:00	20:00	10:00
07/06/2021	Abigail Peterson	E-Learning Integration	TICKET/00022	<input type="checkbox"/>	10:00	15:00	05:00
							30:00



❖ Helpdesk Ticket in Work In Progress Stage [Backend]

The Support User can work on a helpdesk ticket to change the stage of the ticket in Work in Progress, its clickable stage to change the stage by support user.

Helpdesk Helpdesk Analytic Account Martin Luther (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

Edit Create Print Action 1 / 1

New Assigned Work in Progress Needs More Info Needs Reply Reopened Solution Suggested Closed

TICKET/00022
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❖ Helpdesk Ticket in Needs More Info Stage [Backend]

Need more information to solve ticket issues so we can change the stage of ticket Need More Info its clickable stage to change the stage by support user.

Helpdesk Helpdesk Analytic Account Martin Luther (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

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New Assigned Work in Progress Needs More Info Needs Reply Reopened Solution Suggested Closed

Analytic Account

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz
Type of Subject	Functional Issue	Customer Name	Colleen Diaz
Assign To	Martin Luther	Phone	(255)-595-8393
Email	colleen.diaz83@example.com	Allow Users	(Martin Luther) (Mitchell Admin) (Peter Pinaker)
Tasks			
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict
Department	Professional Services	Priority	Low
		Category	Technical
Create Date	07/06/2021 18:30:19	Close Date	
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07/06/2021	Abigail Peterson	E-Learning Integration	TICKET/00022	<input checked="" type="checkbox"/>	10:00	15:00	05:00
							30:00



❖ Helpdesk Ticket in Needs Reply Stage [Backend]

To change the ticket stage in Needs to Reply Stage.

Helpdesk Helpdesk Analytic Account

Helpdesk / TICKET/00022

Print Action 1 / 1 < >

Needs Reply Reopened Solution Suggested Closed

TICKET/00022
Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz																																																
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❖ Support manager can Create Task from Helpdesk Form

The Support Manager can click on the Create Task Button to create tasks from the helpdesk ticket. To Perform the task to solve issues in support tickets.

The screenshot shows the Odoo Helpdesk ticket form for ticket #00022. The top navigation bar includes 'Helpdesk', 'Helpdesk', 'Analytic Account', 'Configuration', and 'Invoicing'. The top right shows a user profile for 'Peter Pinaker (website_helpdesk_support_ticket)'. Below the navigation is a toolbar with 'Edit', 'Create', 'Print', and 'Action' buttons. A breadcrumb navigation shows 'Helpdesk / TICKET/00022'. A status bar at the top indicates '18 / 22' with navigation arrows. The main content area is titled 'TICKET/00022' and has a sub-section 'Technical Problems Of Business Intelligence Software'. The ticket details are organized into two columns. The left column includes fields for 'Type of Ticket' (Technical), 'Type of Subject' (Functional Issue), 'Assign To' (Martin Luther), 'Email' (colleen.diaz83@example.com), and 'Tasks'. The right column includes 'Customer' (Azure Interior, Colleen Diaz), 'Customer Name' (Colleen Diaz), 'Phone' (255)-595-8393, 'Allow Users' (Martin Luther, Mitchell Admin, Peter Pinaker), 'Team Leader' (Peter Pinaker), 'Analytic Account' ([AGR] S00020 - Deco Addict), 'Priority' (Low), and 'Category' (Technical). Below these are sections for 'Helpdesk Team' (Technical Support, AGR - S00020, Professional Services), 'Create Date' (07/06/2021 18:30:19), 'Close Date' (07/06/2021 18:30:19), 'Total Hours Spent' (30:00), and 'Remaining Hours' (-22:00). The 'Create Task' button, located in the top right of the ticket details area, is highlighted with a red box. At the bottom, there are tabs for 'Description', 'Timesheets', 'Add Invoice Lines', 'General Information', and 'Customer Rating'. A note at the bottom states: 'Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view.'



❖ Smart Button of Task on Helpdesk Ticket

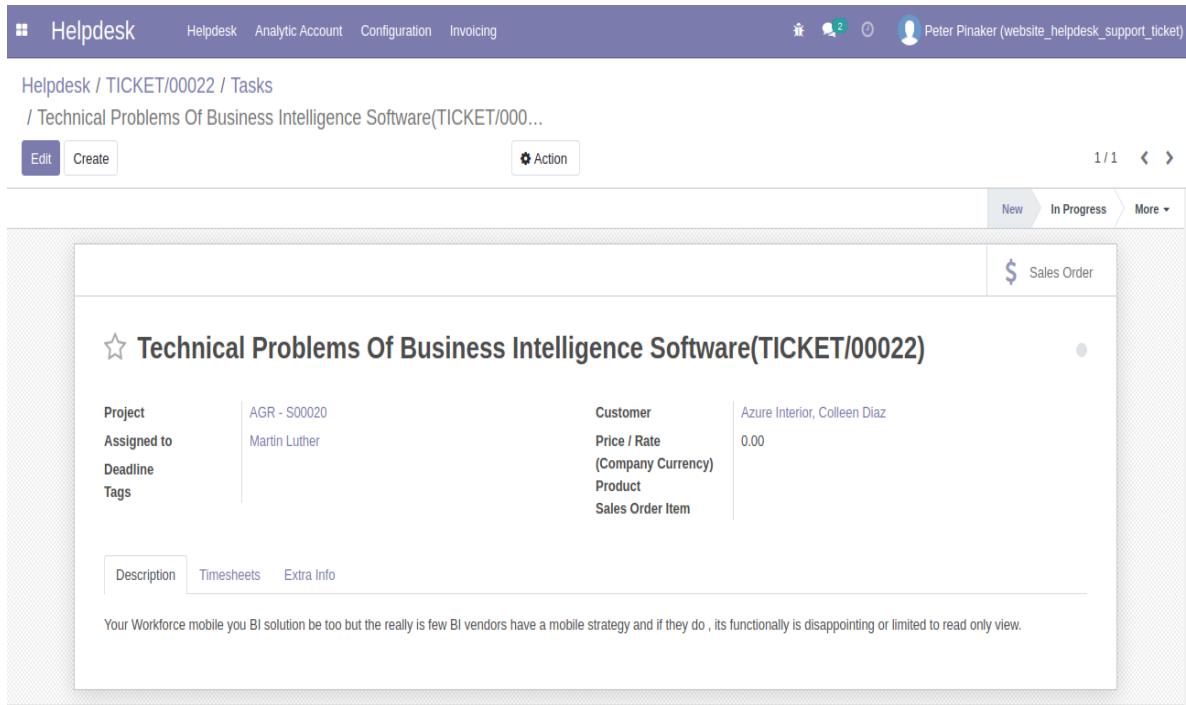
Click on Tasks smart button on helpdesk ticket to open tasks from created helpdesk support ticket.

The screenshot shows the Odoo Helpdesk interface for ticket #00022. The top navigation bar includes 'Helpdesk', 'Helpdesk', 'Analytic Account', 'Configuration', and 'Invoicing'. The top right shows a user profile for 'Peter Pinaker (website_helpdesk_support_ticket)'. The main content area displays the ticket details: 'TICKET/00022', 'Technical Problems Of Business Intelligence Software', and various ticket fields like 'Type of Ticket' (Technical), 'Customer' (Azure Interior, Colleen Diaz), and 'Helpdesk Team' (Technical Support). A prominent red box highlights the 'Tasks' button in the action bar, which is part of a green bar also containing 'Create Invoice', 'Create Task', 'Invoice', and 'Analytic Account'. Below the ticket details, there are sections for 'Create Date' (07/06/2021 18:30:19), 'Is Ticket Closed?' (unchecked), 'Close Date' (30:00), and 'Total Hours Spent' (30:00). At the bottom, there are tabs for 'Description', 'Timesheets', 'Add Invoice Lines', 'General Information', and 'Customer Rating', with a note about workforce mobile functionality.



❖ Open Task Form View from Smart Button of Tasks on Ticket

To show the project task from the created support ticket.

A screenshot of the Odoo Helpdesk interface showing a task form for ticket 00022. The top navigation bar shows "Helpdesk" and other menu items. The breadcrumb navigation shows "Helpdesk / TICKET/00022 / Tasks / Technical Problems Of Business Intelligence Software(TICKET/000...". The main content area displays the task details for "Technical Problems Of Business Intelligence Software(TICKET/00022)". The task is assigned to "Martin Luther" and is a "Sales Order Item". The "Description" tab is selected, showing a note: "Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view." Other tabs include "Timesheets" and "Extra info".

Project	AGR - S00020	Customer	Azure Interior, Colleen Diaz
Assigned to	Martin Luther	Price / Rate (Company Currency)	0.00
Deadline		Product	
Tags		Sales Order Item	



❖ **Support User can fill up Timesheets after Support Manager Assign Ticket to Support User**

Support user can fill a timesheet with what task they can perform on that ticket and how much time is spent for that ticket.

Helpdesk Helpdesk Analytic Account Martin Luther (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

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New Assigned Work in Progress Needs More Info Needs Reply Reopened Solution Suggested Closed

TICKET/00022

Technical Problems Of Business Intelligence Software

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<table border="1"> <thead> <tr> <th>Date</th> <th>Employee</th> <th>Project</th> <th>Helpdesk Support</th> <th>Billable</th> <th>Time In</th> <th>Time Out</th> <th>Duration (Hours)</th> </tr> </thead> <tbody> <tr> <td>07/08/2021</td> <td>Abigail Peterson</td> <td>AGR - S00020</td> <td>TICKET/00022</td> <td><input checked="" type="checkbox"/></td> <td>10:00</td> <td>20:00</td> <td>10:00</td> </tr> <tr> <td>07/07/2021</td> <td>Abigail Peterson</td> <td>Internal Gap Analysis</td> <td>TICKET/00022</td> <td><input checked="" type="checkbox"/></td> <td>10:00</td> <td>15:00</td> <td>05:00</td> </tr> <tr> <td>07/06/2021</td> <td>Abigail Peterson</td> <td>E-Learning Integration</td> <td>TICKET/00022</td> <td><input checked="" type="checkbox"/></td> <td>10:00</td> <td>20:00</td> <td>10:00</td> </tr> <tr> <td>07/06/2021</td> <td>Abigail Peterson</td> <td>E-Learning Integration</td> <td>TICKET/00022</td> <td><input checked="" type="checkbox"/></td> <td>10:00</td> <td>15:00</td> <td>05:00</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>30:00</td> </tr> </tbody> </table>				Date	Employee	Project	Helpdesk Support	Billable	Time In	Time Out	Duration (Hours)	07/08/2021	Abigail Peterson	AGR - S00020	TICKET/00022	<input checked="" type="checkbox"/>	10:00	20:00	10:00	07/07/2021	Abigail Peterson	Internal Gap Analysis	TICKET/00022	<input checked="" type="checkbox"/>	10:00	15:00	05:00	07/06/2021	Abigail Peterson	E-Learning Integration	TICKET/00022	<input checked="" type="checkbox"/>	10:00	20:00	10:00	07/06/2021	Abigail Peterson	E-Learning Integration	TICKET/00022	<input checked="" type="checkbox"/>	10:00	15:00	05:00								30:00
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							30:00																																												



❖ Support Manager can Fill up Invoice Line on Help Desk Ticket Form.

To Fill up the Invoice Line on Helpdesk Ticket to Create Invoice for that ticket which service can be taken or product can be used to solve the ticket problem.

The screenshot shows the Odoo Helpdesk ticket form for ticket #00022. The top navigation bar includes 'Helpdesk', 'Helpdesk', 'Analytic Account', 'Configuration', and 'Invoicing'. The right side shows a user profile for 'Peter Pinaker (website_helpdesk_support_ticket)'. The main content area displays ticket details and a summary table. At the bottom, a tab bar has 'Add Invoice Lines' highlighted with a red box. A table below shows invoice lines for three services: Service Support Hours, GAP Analysis Service, and Service on Timesheet.

Product	Description	Quantity	Unit Price	Unit of Measure	Analytic Account	Is Invoice Create
Service Support Hours	Service Support Hours	10.00	15.00	Units	[AGR] S00020 - Deco Addict	<input type="checkbox"/>
GAP Analysis Service	GAP Analysis Service	10.00	25.00	Units	[AGR] S00020 - Deco Addict	<input type="checkbox"/>
Service on Timesheet	Service on Timesheet	10.00	40.00	Hours	[AGR] S00020 - Deco Addict	<input type="checkbox"/>



❖ Support Manager can Create Invoice from Helpdesk Form

Support Manager can Click on Create Invoice Button to Create Invoice with Invoice Line on Helpdesk Support Ticket.

Helpdesk
Helpdesk
Analytic Account
Configuration
Invoicing

Edit
Create
Print
Action

18 / 22
<
>

Set To Close
New
Assigned
Work in Progress
Needs More Info
Needs Reply
Reopened
Solution Suggested
Closed

Create Invoice
Create Task
Analytic Account

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz
Type of Subject	Functional Issue	Customer Name	Colleen Diaz
Assign To	Martin Luther	Phone	(255)-595-8393
Email	colleen.diaz83@example.com	Allow Users	(Martin Luther) (Mitchell Admin) (Peter Pinaker)
Tasks			
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict
Department	Professional Services	Priority	Low
		Category	Technical
Create Date	07/06/2021 18:30:19	Close Date	
Is Ticket Closed ?	<input type="checkbox"/>	Total Hours Spent	30:00
To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.			
		Total Consumed Hours	22:00
		Total Purchase Hours	00:00
		Remaining Hours	-22:00
		Balance Remaining Hours	-22:00



❖ Set Invoice Reference on helpdesk support ticket after Create Invoice.

Created Invoice References are Set on the invoice reference on General Information Tab and Invoice Smart Button on Helpdesk Ticket.

Helpdesk Helpdesk Analytic Account Configuration Invoicing

Peter Pinaker (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

Edit Create Print Action 18 / 22

Set To Close New Assigned Work in Progress Needs More Info Needs Reply Reopened Solution Suggested Closed

Create Invoice Create Task **Invoice** (highlighted with a red box) Analytic Account

TICKET/00022
Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz
Type of Subject	Functional Issue	Customer Name	Colleen Diaz
Assign To	Martin Luther	Phone	(255)-595-8393
Email	colleen.diaz83@example.com	Allow Users	Martin Luther Mitchell Admin Peter Pinaker
Tasks			
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict
Department	Professional Services	Priority	Low
		Category	Technical
Create Date	07/06/2021 18:30:19	Close Date	
Is Ticket Closed ?	<input type="checkbox"/>	Total Hours Spent	30:00
		To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.	
		Total Consumed Hours	222:00
		Total Purchase Hours	00:00
		Remaining Hours	-222:00
		Balance Remaining Hours	-222:00

Description Timesheets Add Invoice Lines **General Information** (highlighted with a red box) Customer Rating

Invoice Reference Draft Invoice (* 18) (TICKET/00022)
Invoice Journal Customer Invoices



❖ Open Invoice Form View from Smart Button of Invoice on Helpdesk Support Ticket

To show the created customer invoice from helpdesk support ticket

Helpdesk Helpdesk Analytic Account Configuration Invoicing

Helpdesk / TICKET/00022 / Draft Invoice (* 18) (TICKET/00022)

Edit Create Print Action 1 / 1

Confirm Preview Cancel Entry Draft Posted

Customer Invoice
Draft

Customer	Azure Interior, Colleen Diaz 4557 De Silva St Fremont CA 94538 United States	Invoice Date	07/07/2021
Delivery Address		Due Date	End of Following Month
Payment Reference		Journal	Customer Invoices in USD

Invoice Lines Journal Items Other Info

Product	Label	Account	Analytic Account	Analytic Tags	Quantity	UoM	Price	Taxes	Subtotal	⋮
Service Support Hours	Service Support Hours	400000 Product Sales	[AGR] S00020 - Deco ...		10.00	Units	15.00		\$ 150.00	
GAP Analysis Service	GAP Analysis Service	400000 Product Sales	[AGR] S00020 - Deco ...		10.00	Units	25.00		\$ 250.00	
Service on Timesheet	Service on Timesheet	400000 Product Sales	[AGR] S00020 - Deco ...		10.00	Hours	40.00		\$ 400.00	

Total: \$ 800.00



❖ Analytic Account Smart Button on Helpdesk Form

Click on Analytic Account Smart Button on Helpdesk Ticket To open analytic account from helpdesk support ticket

Helpdesk
Helpdesk
Analytic Account
Configuration
Invoicing

Edit
Create
Print
Action

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◀
▶

Set To Close
New
Assigned
Work in Progress
Needs More Info
Needs Reply
Reopened
Solution Suggested
Closed

Create Invoice
Create Task
Tasks
Invoice
Analytic Account

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz								
Type of Subject	Functional Issue	Customer Name	Colleen Diaz								
Assign To	Martin Luther	Phone	(255)-595-8393								
Email	colleen.diaz83@example.com	Allow Users	Martin Luther Mitchell Admin Peter Pinaker								
Company	Probuse Consulting Service Pvt. Ltd.										
Tasks	Technical Problems Of Business In...										
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker								
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict								
Department	Professional Services	Priority	Low								
		Category	Technical								
Create Date	07/06/2021 18:30:19	Close Date									
Is Ticket Closed ?	<input type="checkbox"/>	Total Hours Spent	30:00								
To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.											
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Total Consumed Hours	222:00										
Total Purchase Hours	00:00										
Remaining Hours	-222:00										
Balance Remaining Hours	-222:00										
Description Timesheets Add Invoice Lines General Information Customer Rating											
Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionality is disappointing or limited to read only view.											



❖ Open Analytic Account Form View from Smart Button of Analytic Account on Helpdesk Support Ticket

Open the analytic account form view on the helpdesk support ticket.

A screenshot of the Odoo Helpdesk interface. The top navigation bar shows "Helpdesk" as the active tab, along with "Helpdesk", "Analytic Account", "Configuration", and "Invoicing". The top right shows a user profile for "Peter Pinaker (website_helpdesk_support_ticket)". Below the navigation is a breadcrumb trail: "Helpdesk / TICKET/00022 / Analytic Accounts / [AGR] S00020 - Deco Addict". The main content area shows a ticket with ID "S00020". The ticket details include: Reference "Customer" (AGR Deco Addict), Group "Company" (Probuse Consulting Service Pvt. Ltd.), Currency "USD", and a "Prepaid Hours" section. Below this is a table showing "Sales Order" details: S00020 (Date 07/07/2021, Purchased Hours 22.00) and S00005 (Date 07/07/2021, Purchased Hours 25.00).

Sales Order	Date of Sales Order	Purchased Hours
S00020	07/07/2021	22.00
S00005	07/07/2021	25.00



❖ Set to Close button on Helpdesk Form

Click on Set to Close Button to close the ticket and send a notification email to the customer with a link to give feedback on the ticket.

Helpdesk
Helpdesk
Analytic Account
Configuration
Invoicing

Peter Pinaker (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022
Edit
Create
Print
Action
18 / 22
<
>

Set To Close
New
Assigned
Work in Progress
Needs More Info
Needs Reply
Reopened
Solution Suggested
Closed

Create Invoice
Create Task
Tasks
Invoice
Analytic Account

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz
Type of Subject	Functional Issue	Customer Name	Colleen Diaz
Assign To	Martin Luther	Phone	(255)-595-8393
Email	colleen.diaz83@example.com	Allow Users	Martin Luther Mitchell Admin Peter Pinaker
Company	Probuse Consulting Service Pvt. Ltd.		
Tasks	Technical Problems Of Business In...		
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict
Department	Professional Services	Priority	Low
		Category	Technical
Create Date	07/06/2021 18:30:19	Close Date	
Is Ticket Closed ?	<input type="checkbox"/>	Total Hours Spent	30:00
		To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.	
		Total Consumed Hours	222:00
		Total Purchase Hours	00:00
		Remaining Hours	-222:00
		Balance Remaining Hours	-222:00

[Description](#) [Timesheets](#) [Add Invoice Lines](#) [General Information](#) [Customer Rating](#)

Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view.



❖ Support Manager Closed Ticket [Backend]

When Support Manager Click on Set to Close Button on Helpdesk Ticket to Closed Ticket and send notification email to customer to give feedback on ticket.

Helpdesk Helpdesk Analytic Account Configuration Invoicing

Helpdesk / TICKET/00022

Print Action 18 / 22 < >

Re Open New Assigned Work in Progress Needs More Info Needs Reply Reopened Solution Suggested **Closed**

Create Invoice Tasks Invoice Analytic Account

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz
Type of Subject	Functional Issue	Customer Name	Colleen Diaz
Assign To	Martin Luther	Phone	(255)-595-8393
Email	colleen.diaz83@example.com	Allow Users	Martin Luther, Mitchell Admin, Peter Pinaker
Company	Probuse Consulting Service Pvt. Ltd.		
Tasks	Technical Problems Of Business In...		
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict
Department	Professional Services	Priority	Low
		Category	Technical
Create Date	07/06/2021 18:30:19	Close Date	07/07/2021 10:56:40
Is Ticket Closed ?	<input checked="" type="checkbox"/>	Total Hours Spent	30:00
To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.			
Total Consumed Hours 22:00 Total Purchase Hours 00:00 Remaining Hours -22:00 Balance Remaining Hours -22:00			
Description Timesheets Add Invoice Lines General Information Customer Rating			
Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view.			



❖ Sent Email after Closed Ticket and Email Form View [Backend]

Send Feedback Link to the customer in an email template for giving feedback.

Screenshot of the Odoo Helpdesk module showing a closed ticket and a feedback form.

The ticket details are as follows:

- TICKET/00022 - Technical Problems Of Business Intelligence Software (Closed)**
- by Peter Pinaker on 07/07/2021 10:56:45 [Reply](#)
- From:** contact@probuse.com
- To:** colleen.diaz83@example.com
- To (Partners):**
- Cc:**
- Reply-To:**
- Scheduled Send Date:**

The ticket body contains the following text:

Dear Colleen Diaz,

We have closed your ticket for now, if you want to reopen please do not hesitate contact us.

[Please give your feedback](#)

Thanks for your participation!

Thank you for choosing Probuse Consulting Service Pvt. Ltd.!

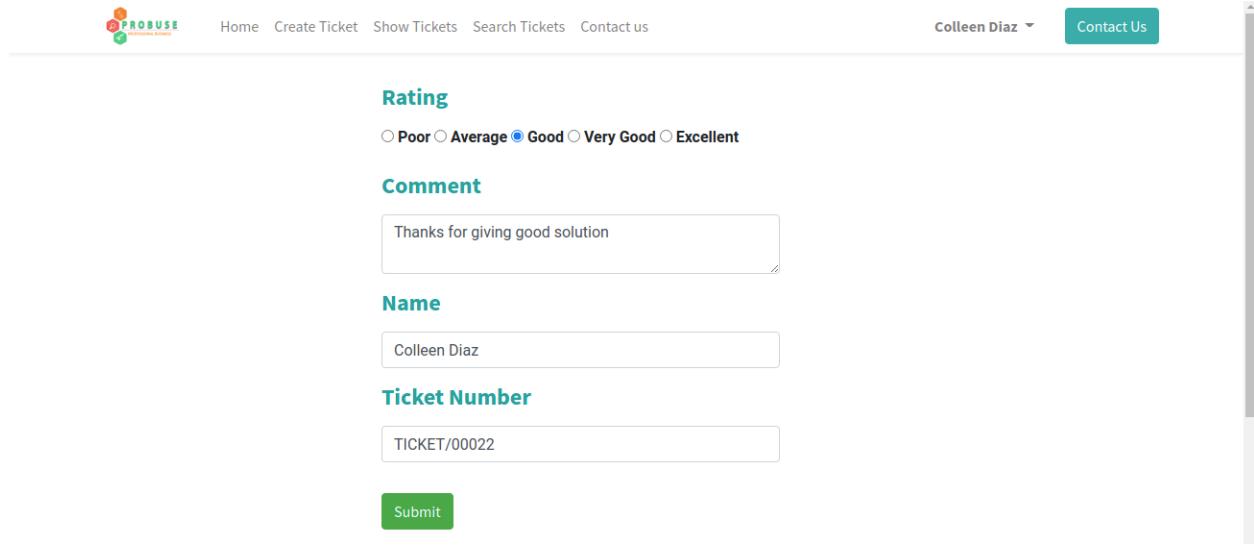
PROBUSE CONSULTING SERVICE PVT. LTD.

Probuse Consulting Service Pvt. Ltd.
SAKAR IX, Beside Old Reserve Bank of India
Ashram Road, near City Gold
Ahmedabad 380009
Gujarat GJ
India
Phone: 96011 19434
Web : <http://www.probuse.com>



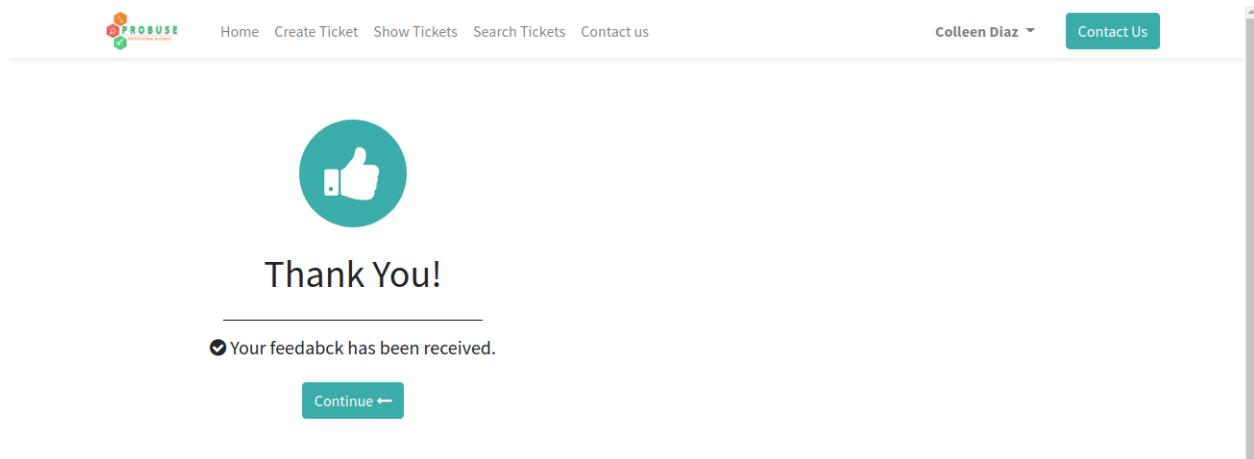
❖ Open Feedback Form from Email Form View [Portal]

Customers can give feedback on the ticket which was created by him.

A screenshot of a feedback form interface. At the top, there is a navigation bar with links for Home, Create Ticket, Show Tickets, Search Tickets, and Contact us. On the right, there is a user profile for "Colleen Diaz" and a "Contact Us" button. The main content area contains fields for "Rating" (radio buttons for Poor, Average, Good, Very Good, Excellent, with "Good" selected), "Comment" (text area containing "Thanks for giving good solution"), "Name" (text area containing "Colleen Diaz"), and "Ticket Number" (text area containing "TICKET/00022"). A "Submit" button is located at the bottom left of the form area.

❖ Acknowledgement Message of Feedback [Portal]

Customers can give rating on feedback after giving an acknowledgement message of feedback.

A screenshot of an acknowledgement message interface. At the top, there is a navigation bar with links for Home, Create Ticket, Show Tickets, Search Tickets, and Contact us. On the right, there is a user profile for "Colleen Diaz" and a "Contact Us" button. The main content area features a large green circular icon with a white thumbs-up symbol. Below the icon, the text "Thank You!" is displayed. A horizontal line with the message "Your feedabck has been received." and a "Continue ←" button are located at the bottom.



❖ Customer Rating Tab filled up from Rating Form

The Support Manager can see the feedback rating given by the customer on the help desk support ticket.

Helpdesk Helpdesk Analytic Account Configuration Invoicing Peter Pinaker (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

Re Open New Assigned Work in Progress Needs More Info Needs Reply Reopened Solution Suggested Closed

Print Action 21 / 22 < >

Create Invoice Tasks Invoice Analytic Account

TICKET/00022
Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz				
Type of Subject	Functional Issue	Customer Name	Colleen Diaz				
Assign To	Martin Luther	Phone	(255)-595-8393				
Email	colleen.diaz83@example.com	Allow Users	(Martin Luther) (Mitchell Admin) (Peter Pinaker)				
Company	Probuse Consulting Service Pvt. Ltd.						
Tasks	Technical Problems Of Business In...						
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker				
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict				
Department	Professional Services	Priority	Low				
		Category	Technical				
Create Date	07/06/2021 18:30:19	Close Date	07/07/2021 10:56:40				
Is Ticket Closed ?	<input checked="" type="checkbox"/>	Total Hours Spent	30:00				
To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.							
		Total Consumed Hours	222:00				
		Total Purchase Hours	00:00				
		Remaining Hours	-222:00				
		Balance Remaining Hours	-222:00				
Description Timesheets Add Invoice Lines General Information Customer Rating							
<table border="1"> <tbody> <tr> <td>Customer Rating</td> <td>Good</td> </tr> <tr> <td>Customer Comment</td> <td>Thanks for giving good solution</td> </tr> </tbody> </table>				Customer Rating	Good	Customer Comment	Thanks for giving good solution
Customer Rating	Good						
Customer Comment	Thanks for giving good solution						



❖ Tickets Menu on Portal/My Account - Login with Customer (Azure Interior, Colleen Diaz)

Customer can see her Support Ticket on my account portal.

A screenshot of the Probuse customer portal. At the top, there is a navigation bar with links: Home, Create Ticket, Show Tickets, Search Tickets, and Contact us. On the right side of the top bar, there is a dropdown menu for "Colleen Diaz" and a "Contact Us" button. The main content area is divided into two sections. On the left, there is a "Documents" sidebar with links to Quotations, Sales Orders, Tickets, Invoices & Bills, Projects, Tasks, and Timesheets. The "Tickets" link is highlighted with a red box. On the right, there is a "Details" section with edit links for "Azure Interior, Colleen Diaz" (Address: 4557 De Silva St, Fremont CA 94538, United States, Phone: (255)-595-8393, Email: colleen.diaz83@example.com) and an "Account Security" section with an edit link for "Edit Security Settings".

Link	Count
Quotations	0
Sales Orders	0
Tickets	21
Invoices & Bills	2
Projects	0
Tasks	0
Timesheets	0



❖ List View of Helpdesk Support Tickets [Portal]

Customers can see the list of tickets created by him. Customers can search helpdesk support ticket by number, title, date, stage and priority.

Probuse Professional Business

Home Create Ticket Show Tickets Search Tickets Contact us

Colleen Diaz Contact Us

[/ Tickets](#)

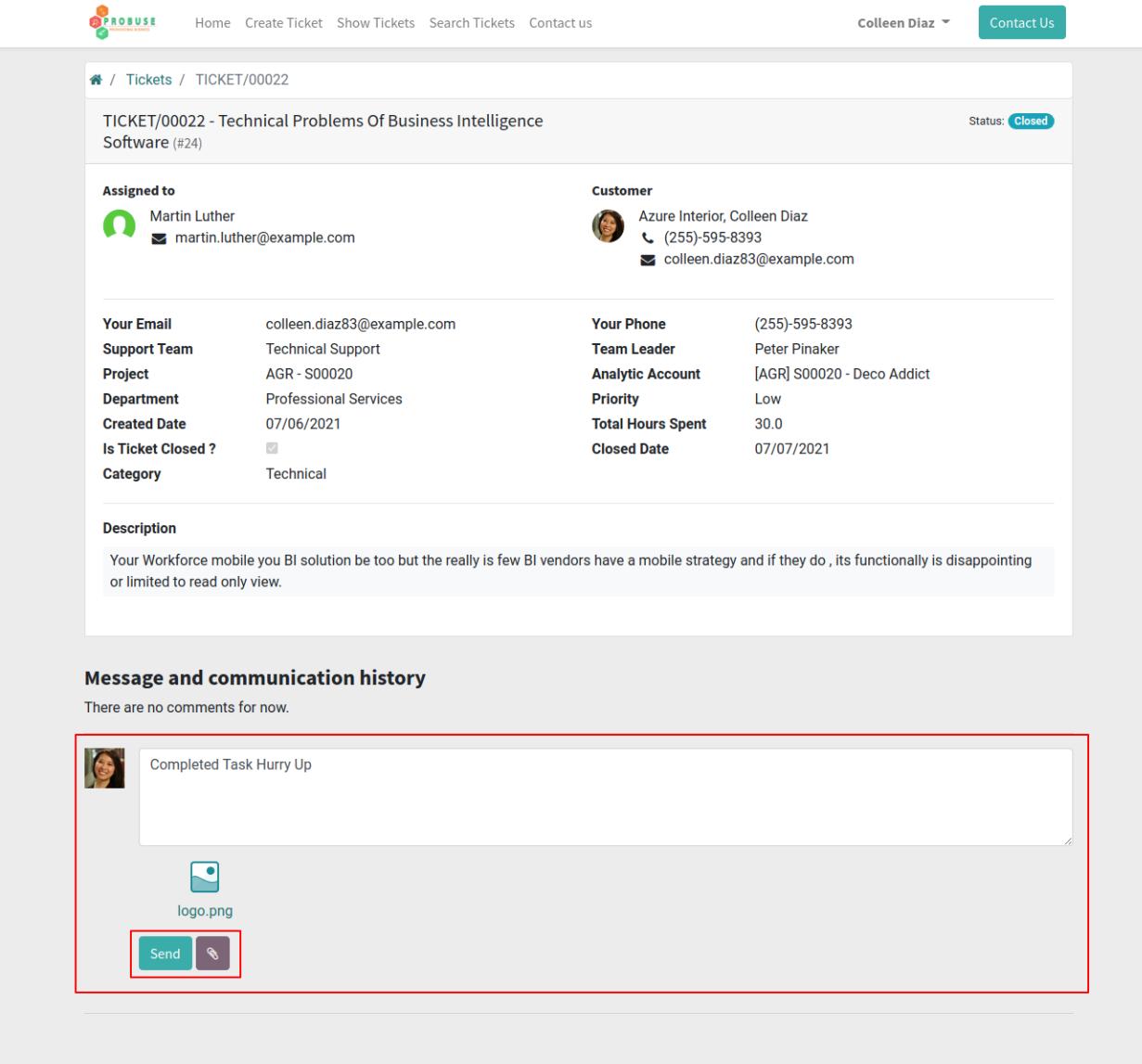
Ticket No	Title	Date	Priority	Stage
TICKET/00022	Technical Problems Of Busines...	07/06/2021 18:30:19	Low	Closed
TICKET/00020	Power Supply Problems	07/06/2021 15:45:44	High	New
TICKET/00019	Errors In Programming	07/06/2021 15:45:18	High	Work in Progress
TICKET/00018	Computer does not Recognize t...	07/06/2021 15:42:20	Low	Needs Reply
TICKET/00017	The Wireless Network is Kicking...	07/06/2021 15:38:35	Low	Work in Progress
TICKET/00016	BYOD Network Connection	07/06/2021 15:36:37	Low	New
TICKET/00015	Adobe Acrobat Reader Needs to...	07/06/2021 15:35:13	Middle	New
TICKET/00014	Third-Party Software Problems	07/06/2021 15:34:38	Middle	Needs More Info
TICKET/00013	Video Conferencing Error	07/06/2021 15:34:10	Middle	Assigned
TICKET/00012	Printer Problems	07/06/2021 14:59:19	Middle	Assigned
TICKET/00011	Restoring Files	07/06/2021 14:58:10	Middle	Work in Progress
TICKET/00010	The Computer is Shutting Down ...	07/06/2021 14:56:21	Low	New
TICKET/00009	Storage Issue Question	07/06/2021 14:42:55	Middle	Needs More Info
TICKET/00008	Help Finding System	07/06/2021 14:42:29	High	Needs Reply
TICKET/00007	Invoice Issue	07/06/2021 14:39:50	Low	Assigned
TICKET/00006	Issue Updating Attendance	07/06/2021 14:35:59	Middle	Work in Progress
TICKET/00005	Operating System will not Start	07/06/2021 14:35:28	Middle	New
TICKET/00004	Trouble Shooting Operating Syst...	07/06/2021 14:34:18	High	Needs More Info
TICKET/00003	OutSourcing Technical Support	07/06/2021 14:33:34	Middle	Assigned
TICKET/00002	Technical Problems of Business...	07/06/2021 14:32:55	Low	Needs Reply

Prev 1 2 Next



❖ Ticket Form View with Chatter [Portal]

Customers can see the ticket with the team leader, team, category, etc. Also can send messages or attachments on chatter.



The screenshot shows a ticket detail page for "TICKET/00022 - Technical Problems Of Business Intelligence Software (#24)".

Assigned to: Martin Luther (martin.luther@example.com)

Customer: Azure Interior, Colleen Diaz (255)-595-8393 (colleen.diaz83@example.com)

Details:

Your Email	colleen.diaz83@example.com	Your Phone	(255)-595-8393
Support Team	Technical Support	Team Leader	Peter Pinaker
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict
Department	Professional Services	Priority	Low
Created Date	07/06/2021	Total Hours Spent	30.0
Is Ticket Closed ?	<input checked="" type="checkbox"/>	Closed Date	07/07/2021
Category	Technical		

Description: Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view.

Message and communication history:

There are no comments for now.

A message from Colleen Diaz: "Completed Task Hurry Up" with an attachment "logo.png".

Buttons: Send, Attachment icon.



❖ Message Sent to Backend on Ticket Form

Support Manager or Support User can see the chatter message or attachments on the ticket in the backend sent by the customer.

Helpdesk Helpdesk Analytic Account Configuration Invoicing

Peter Pinaker (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

Print Action

1 / 1

Re Open New Assigned Work in Progress Needs More Info Needs Reply Reopened Solution Suggested Closed

Create Invoice Tasks Invoice Analytic Account

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz
Type of Subject	Functional Issue	Customer Name	Colleen Diaz
Assign To	Martin Luther	Phone	(255)-595-8393
Email	colleen.diaz83@example.com	Allow Users	(Martin Luther) (Mitchell Admin) (Peter Pinaker)
Company	Probuse Consulting Service Pvt. Ltd.		
Tasks	Technical Problems Of Business In...		
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict
Department	Professional Services	Priority	Low
		Category	Technical
Create Date	07/06/2021 18:30:19	Close Date	07/07/2021 10:56:40
Is Ticket Closed ?	<input checked="" type="checkbox"/>	Total Hours Spent	30:00
To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.			
		Total Consumed Hours	222:00
		Total Purchase Hours	00:00
		Remaining Hours	-222:00
		Balance Remaining Hours	-222:00
Description Timesheets Add Invoice Lines General Information Customer Rating			
Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view.			

Send message Log note Schedule activity

Today

Colleen Diaz - 2 minutes ago Completed Task Hurry Up

Probuse Professional Business



❖ Manage Attachments on Ticket Form [Backend]

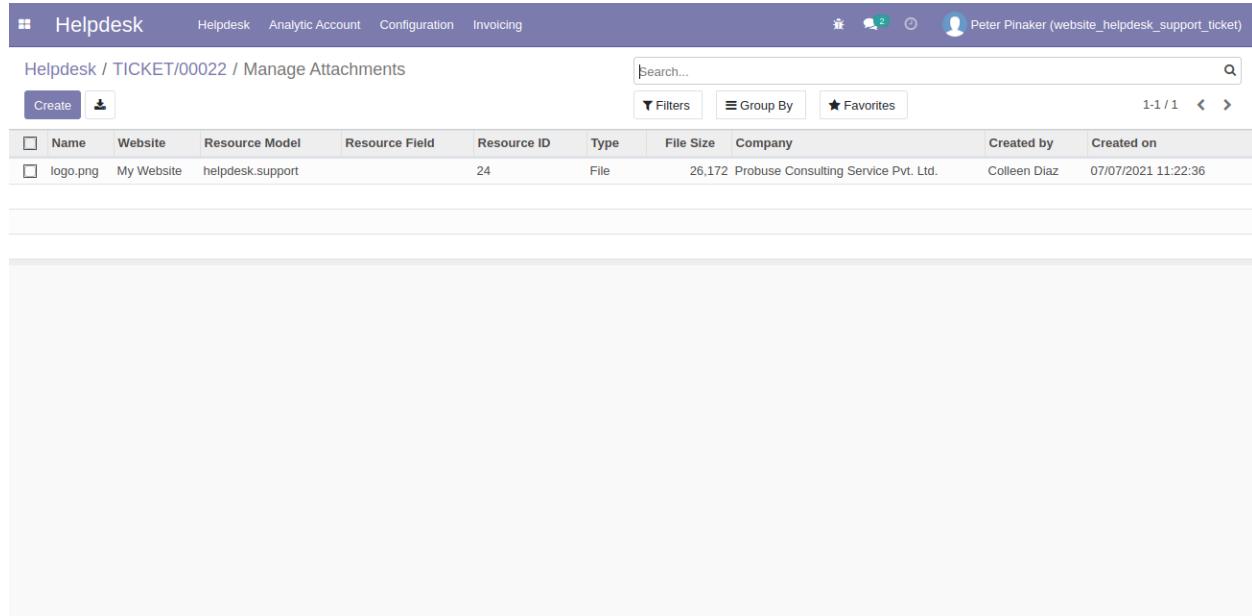
Support users can see the attachment on the helpdesk ticket which is sent by the customer.

A screenshot of the Odoo Helpdesk module. The top navigation bar shows "Helpdesk", "Helpdesk", "Analytic Account", "Configuration", and "Invoicing". The user is Peter Pinaker (website_helpdesk_support_ticket). The main view shows a ticket for "TICKET/00022" with the subject "Technical Problems Of Business Intelligence Software". The ticket details include: Type of Ticket: Technical; Type of Subject: Functional Issue; Assign To: Martin Luther; Email: colleen.diaz83@example.com; Company: Probuse Consulting Service Pvt. Ltd.; Tasks: [Technical Problems Of Business In...]; Helpdesk Team: Technical Support; Project: AGR - S00020; Department: Professional Services. A context menu is open on the right, listing various actions: Run JS Tests, Run JS Mobile Tests, Run Click Everywhere Test, Open View, Edit Action, View Fields, Manage Filters, Technical Translation, Set Defaults, View Metadata, Manage Messages, and Manage Attachments. The "Manage Attachments" option is highlighted with a red box. Other menu items include Fields View Get, Edit View: Form, Edit ControlPanelView, Activate Assets Debugging, Activate Tests Assets Debugging, Regenerate Assets Bundles, and Leave the Developer Tools. The status bar at the bottom right shows "1 / 1" and navigation arrows. The footer of the screenshot shows "Colleen Diaz", "Mitchell Admin", and "Peter Pinaker".



❖ Open List View of Attachments from Manage Attachments Menu [Backend]

Open Attachment from Manage Attachments Menu on Helpdesk Support Ticket.

A screenshot of the Odoo Helpdesk Attachments list view. The top navigation bar shows "Helpdesk" and other menu items: Helpdesk, Analytic Account, Configuration, and Invoicing. The top right shows a user profile for "Peter Pinaker (website_helpdesk_support_ticket)". The main title is "Helpdesk / TICKET/00022 / Manage Attachments". Below the title is a search bar and filter buttons for "Filters", "Group By", and "Favorites". A pagination indicator shows "1-1 / 1" with navigation arrows. The data table has columns: Name, Website, Resource Model, Resource Field, Resource ID, Type, File Size, Company, Created by, and Created on. One attachment is listed: "logo.png" from "My Website" with "helpdesk.support" as the Resource Model. The attachment details are: Resource ID 24, Type File, File Size 26,172, Company Probuse Consulting Service Pvt. Ltd., Created by Colleen Diaz, and Created on 07/07/2021 11:22:36. The table has a header row and a data row.



❖ Support Ticket Kanban View

Support Manager can See the List of Helpdesk Tickets in Kanban View.

Helpdesk Helpdesk Analytic Account Configuration Invoicing

Peter Pinaker (website_helpdesk_support_ticket)

Helpdesk Create

Search... Filters Group By Favorites

New Assigned Work in Progress Needs More Info Needs Reply

New	Assigned	Work in Progress	Needs More Info	Needs Reply
<p>TICKET/00020 Power Supply Problems Martin Luther 07/06/2021 15:45:44 New : High</p> <p> </p>	<p>TICKET/00013 Video Conferencing Error Martin Luther 07/06/2021 15:34:10 Assigned : Middle</p> <p> </p>	<p>TICKET/00019 Errors In Programming Martin Luther 07/06/2021 15:45:18 Work in Progress : High</p> <p> </p>	<p>TICKET/00014 Third-Party Software Problems Martin Luther 07/06/2021 15:34:38 Needs More Info : Middle</p> <p> </p>	<p>TICKET/00018 Computer does not Recognize It's USB Device Martin Luther 07/06/2021 15:42:20 Needs Reply : Low</p> <p> </p>
<p>TICKET/00016 BYOD Network Connection Martin Luther 07/06/2021 15:36:37 New : Low</p> <p> </p>	<p>TICKET/00012 Printer Problems Martin Luther 07/06/2021 14:59:19 Assigned : Middle</p> <p> </p>	<p>TICKET/00017 The Wireless Network is Kicking People Out Martin Luther 07/06/2021 15:38:35 Work in Progress : Low</p> <p> </p>	<p>TICKET/00009 Storage Issue Question Martin Luther 07/06/2021 14:42:55 Needs More Info : Middle</p> <p> </p>	<p>TICKET/00008 Help Finding System Martin Luther 07/06/2021 14:42:29 Needs Reply : High</p> <p> </p>
<p>TICKET/00015 Adobe Acrobat Reader Needs to be Updated Martin Luther 07/06/2021 15:35:13 New : Middle</p> <p> </p>	<p>TICKET/00007 Invoice Issue Martin Luther 07/06/2021 14:39:50 Assigned : Low</p> <p> </p>	<p>TICKET/00011 Restoring Files Martin Luther 07/06/2021 14:58:10 Work in Progress : Middle</p> <p> </p>	<p>TICKET/00004 Trouble Shooting Operating System Issues Martin Luther 07/06/2021 14:34:18 Needs More Info : High</p> <p> </p>	<p>TICKET/00002 Technical Problems of Business Intelligence Software Martin Luther 07/06/2021 14:32:55 Needs Reply : Low</p> <p> </p>
<p>TICKET/00010 The Computer is Shutting Down for no Reason Martin Luther 07/06/2021 14:56:21 New : Low</p> <p> </p>	<p>TICKET/00003 OutSourcing Technical Support Martin Luther 07/06/2021 14:33:34 Assigned : Middle</p> <p> </p>	<p>TICKET/00006 Issue Updating Attendance Martin Luther 07/06/2021 14:35:59 Work in Progress : Middle</p> <p> </p>	<p>TICKET/00001 Request for Festival Materials Martin Luther 07/06/2021 14:32:29 Needs More Info : Low</p> <p> </p>	
<p>TICKET/00005 Operating System will not Start Martin Luther 07/06/2021 14:35:28 New : Middle</p> <p> </p>				



❖ Support Ticket List View

Support Manager Can See the List of Helpdesk Support Tickets in List View.

Helpdesk											
Helpdesk Analytic Account Configuration Invoicing Peter Pinaker (website_helpdesk_support_ticket) 											
Helpdesk <div style="float: right; margin-top: -20px;"> <input type="text" value="Search..."/> ▼ Filters Group By ★ Favorites 1-22 / 22 ◀ ▶ </div>											
Number	Subject	Type of Ticket	Assign To	Customer	Email	Phone	Category	Priority	Type	Company	
TICKET/00022	Technical Problems O...	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Low	Closed	Probuse Consulting S...	
TICKET/00021	Power Supply Problems		Joel Willis	YourCompany, Mitchel...	admin@yourcompany...	+1 555-555-5555	Technical	Low	Closed	Probuse Consulting S...	
TICKET/00020	Power Supply Problems	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	High	New	Probuse Consulting S...	
TICKET/00019	Errors In Programming	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	High	Work in Progress	Probuse Consulting S...	
TICKET/00018	Computer does not R...	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Low	Needs Reply	Probuse Consulting S...	
TICKET/00017	The Wireless Network...	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Low	Work in Progress	Probuse Consulting S...	
TICKET/00016	BYOD Network Conn...	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Low	New	Probuse Consulting S...	
TICKET/00015	Adobe Acrobat Reader...	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Middle	New	Probuse Consulting S...	
TICKET/00014	Third-Party Software ...	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Middle	Needs More Info	Probuse Consulting S...	
TICKET/00013	Video Conferencing E...	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Middle	Assigned	Probuse Consulting S...	
TICKET/00012	Printer Problems	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Middle	Assigned	Probuse Consulting S...	
TICKET/00011	Restoring Files	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Middle	Work in Progress	Probuse Consulting S...	
TICKET/00010	The Computer is Shut...	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Low	New	Probuse Consulting S...	
TICKET/00009	Storage Issue Question	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Functional	Middle	Needs More Info	Probuse Consulting S...	
TICKET/00008	Help Finding System	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	High	Needs Reply	Probuse Consulting S...	
TICKET/00007	Invoice Issue	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Low	Assigned	Probuse Consulting S...	
TICKET/00006	Issue Updating Attend...	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Functional	Middle	Work in Progress	Probuse Consulting S...	
TICKET/00005	Operating System will ...	Technical	Martin Luther	Azure Interior, Colleen...	colleen.diaz83@exam...	(255)-595-8393	Technical	Middle	New	Probuse Consulting S...	



❖ Support Ticket - Calendar View [Backend]

The Support Manager can see the list of tickets in the calendar view with day wise, week wise, month wise and year wise tickets.

Helpdesk
Helpdesk
Analytic Account
Configuration
Invoicing

*
2
○
User

Helpdesk (July 2021) Search...

Today
Day
Week
Month
Year

▼ Filters
★ Favorites

List
Grid
Report
Calendar

Sunday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday	
27	27		28		29		30		1		2		3
28	4		5		6		7		8		9		10
29	11		12		13		14		15		16		17
30	18		19		20		21		22		23		24
31	25		26		27		28		29		30		31
32	1		2		3		4		5		6		7

List
Grid
Report
Calendar

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Jul 2021
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❖ Helpdesk Report (Pivot view)

To display the list of helpdesk tickets in pivot view analysis report.

Helpdesk Helpdesk Analytic Account Configuration Invoicing

Search... 🔍

Measures Filters Group By Favorites

Helpdesk

	Total						
	Assigned	Closed	Needs More Info	Needs Reply	New	Work in Progress	Count
	Count	Count	Count	Count	Count	Count	
Total	4	2	4	3	5	4	
+ TICKET/00001				1			1
+ TICKET/00002					1		1
+ TICKET/00003	1						1
+ TICKET/00004				1			1
+ TICKET/00005					1		1
+ TICKET/00006						1	1
+ TICKET/00007	1						1
+ TICKET/00008					1		1
+ TICKET/00009			1				1
+ TICKET/00010					1		1
+ TICKET/00011						1	1
+ TICKET/00012	1						1
+ TICKET/00013	1						1
+ TICKET/00014			1				1
+ TICKET/00015				1			1
+ TICKET/00016					1		1
+ TICKET/00017						1	1
+ TICKET/00018				1			1
+ TICKET/00019						1	1
+ TICKET/00020					1		1
+ TICKET/00021		1					1
+ TICKET/00022		1					1



❖ Helpdesk of Analytic Account Report [Backend]

To display the Analytic Account Analysis Report on Pivot View.

Helpdesk Helpdesk Analytic Account Configuration Invoicing

Helpdesk Analytic Account Search...

Measures

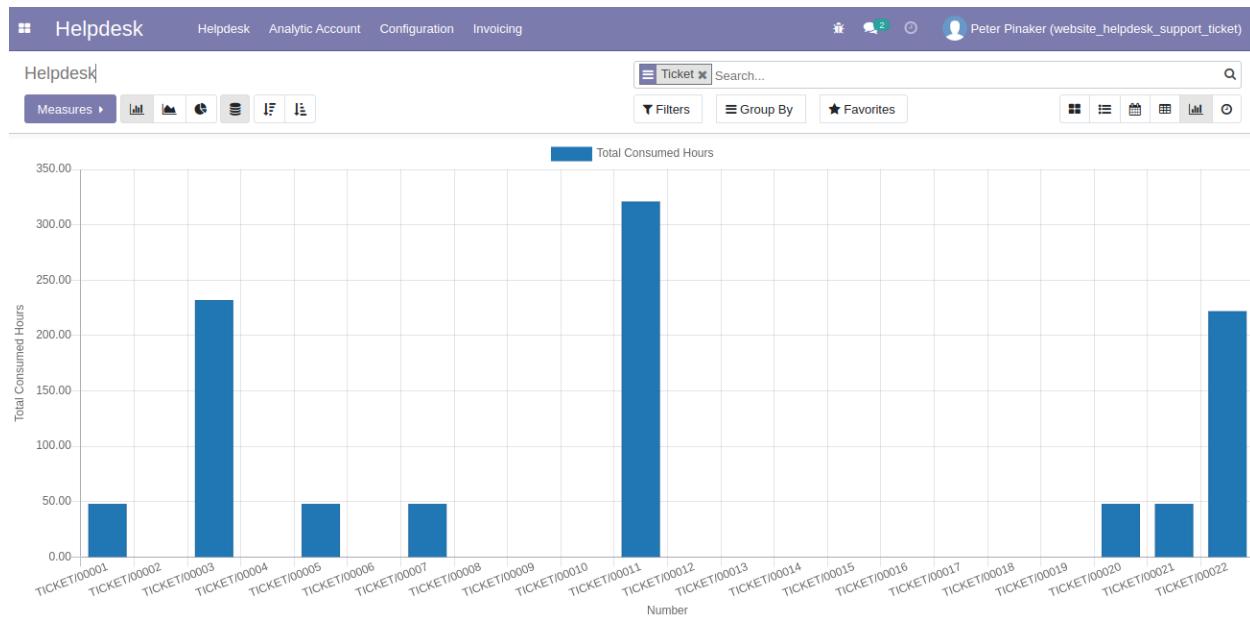
 Filters Group By Favorites

	Total						
	+ Assigned	+ Closed	+ Needs More Info	+ Needs Reply	+ New	+ Work in Progress	
	Count	Count	Count	Count	Count	Count	Count
- Total	4	1	4	3	5	5	22
+ [AGR] S00020 - Deco Addict	1	1					2
+ [DPC] S00021 - Ready Mat	1		1		2	1	5
+ [INT] After-Sales Services	1		2			1	4
+ Administrative						2	2
+ Asustek - Wood Corner				1	2		3
+ CampToCamp - Azure Interior				2	1		3
+ Commercial & Marketing			1				1
+ Delta PC - Ready Mat		1					1
+ Office Design - Joel Willis						1	1



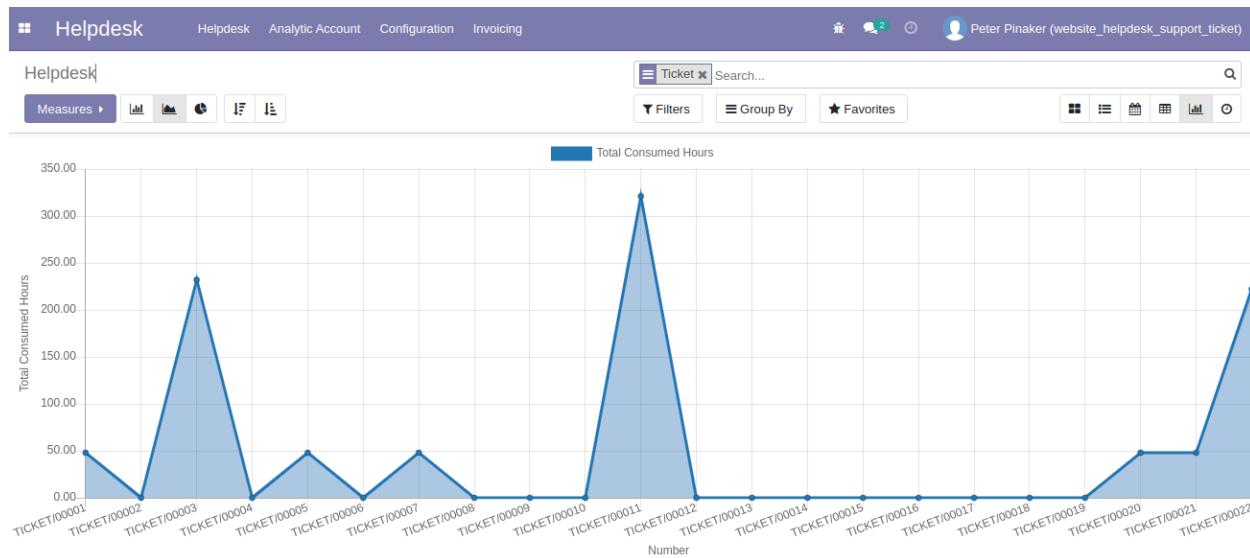
❖ Bar Chart of Helpdesk Ticket in Report [Backend]

Display the Helpdesk ticket Report in Bar Chart Graph View.



❖ Line Chart of Helpdesk Ticket in Report [Backend]

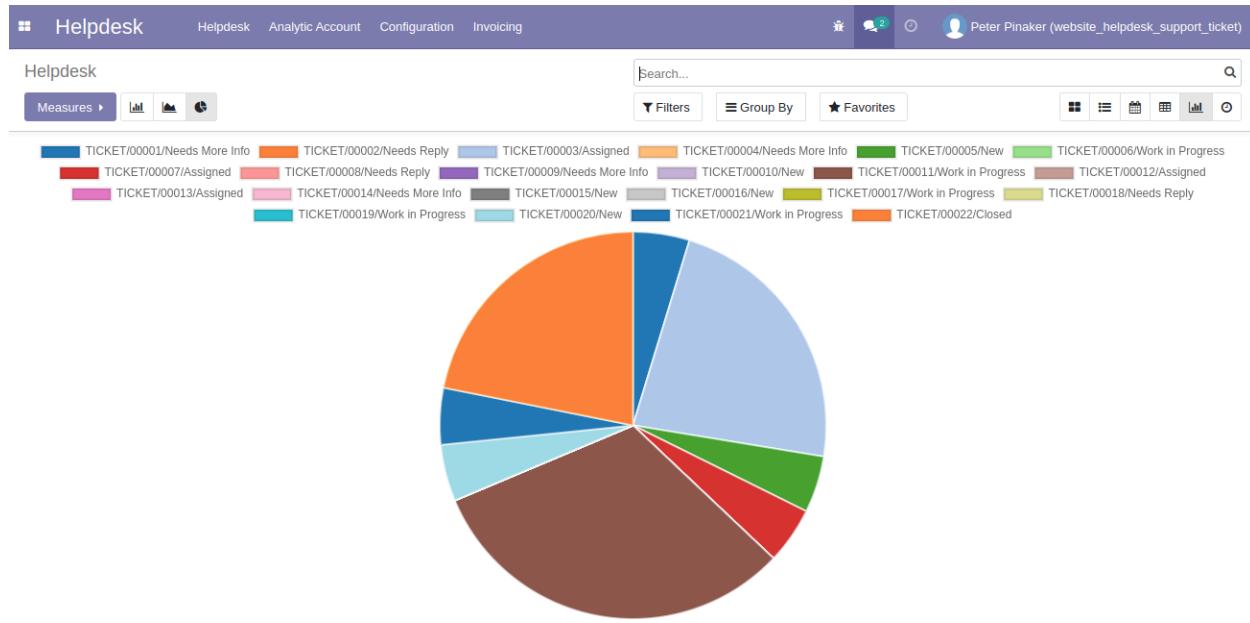
Display the Helpdesk Ticket in Line Chart View.





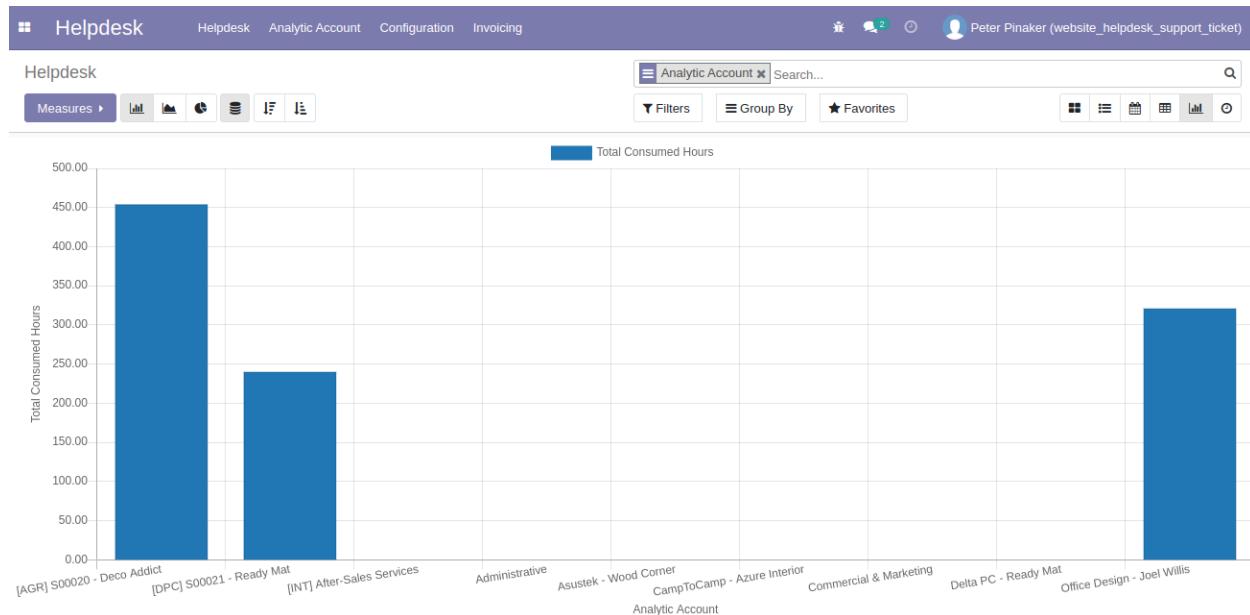
❖ Pie Chart of Helpdesk Ticket in Report [Backend]

To Display the Helpdesk Ticket in Pie Chart View.



❖ Bar Chart of Analytic Account in Report [Backend]

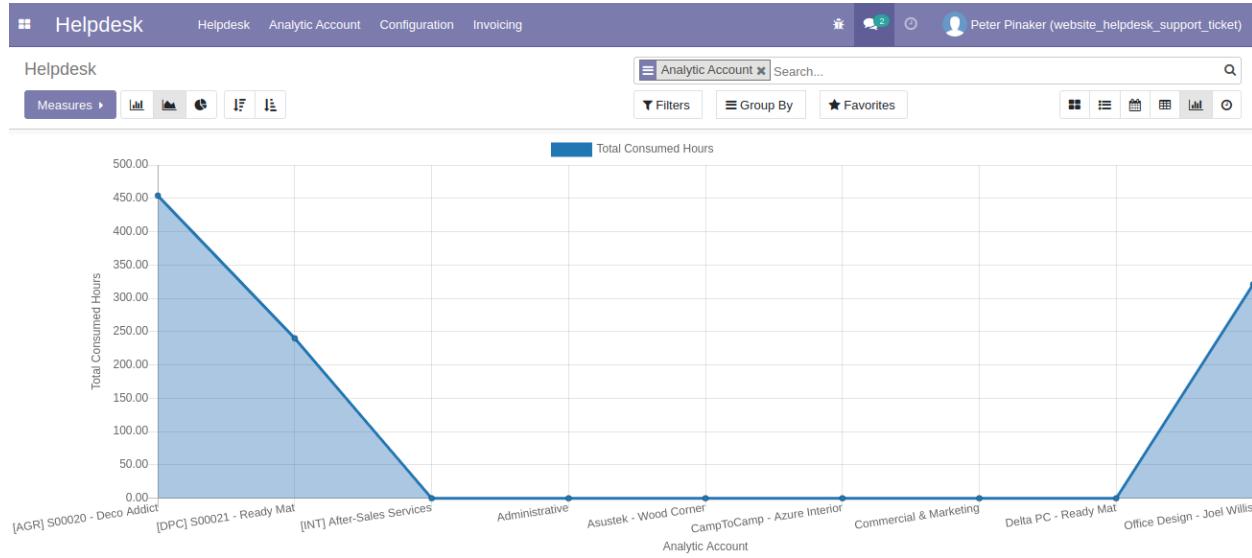
To display the helpdesk ticket bar chart analysis report group by analytic account in the backend.





❖ Line Chart of Analytic Account in Report [Backend]

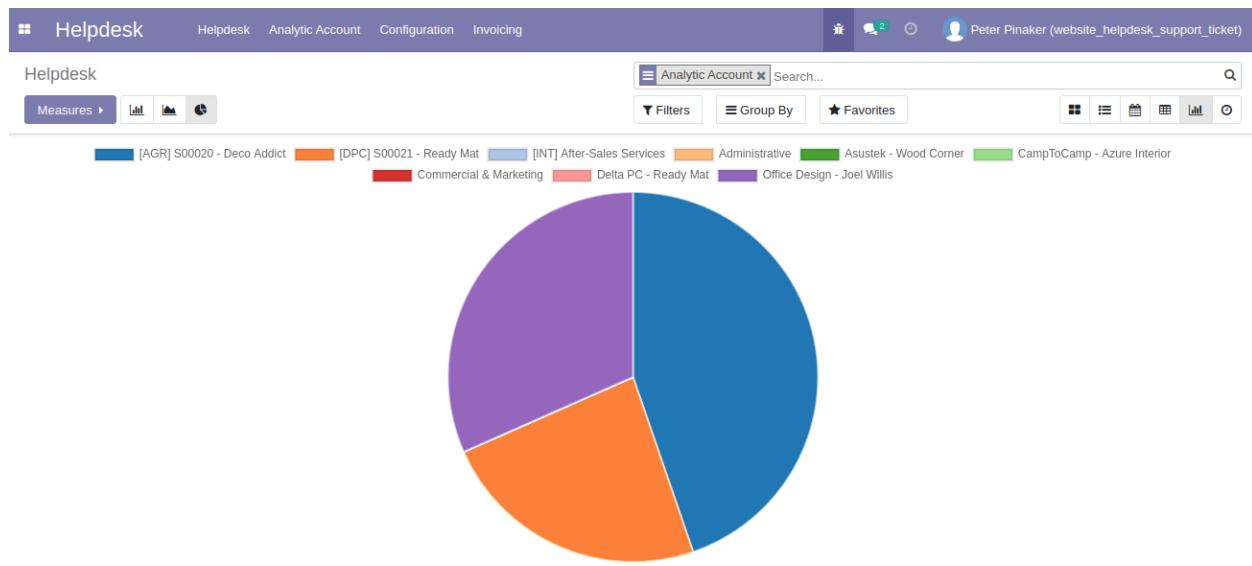
To display the helpdesk ticket line chart analysis report group by analytic account in the backend





❖ Pie Chart of Analytic Account in Report [Backend]

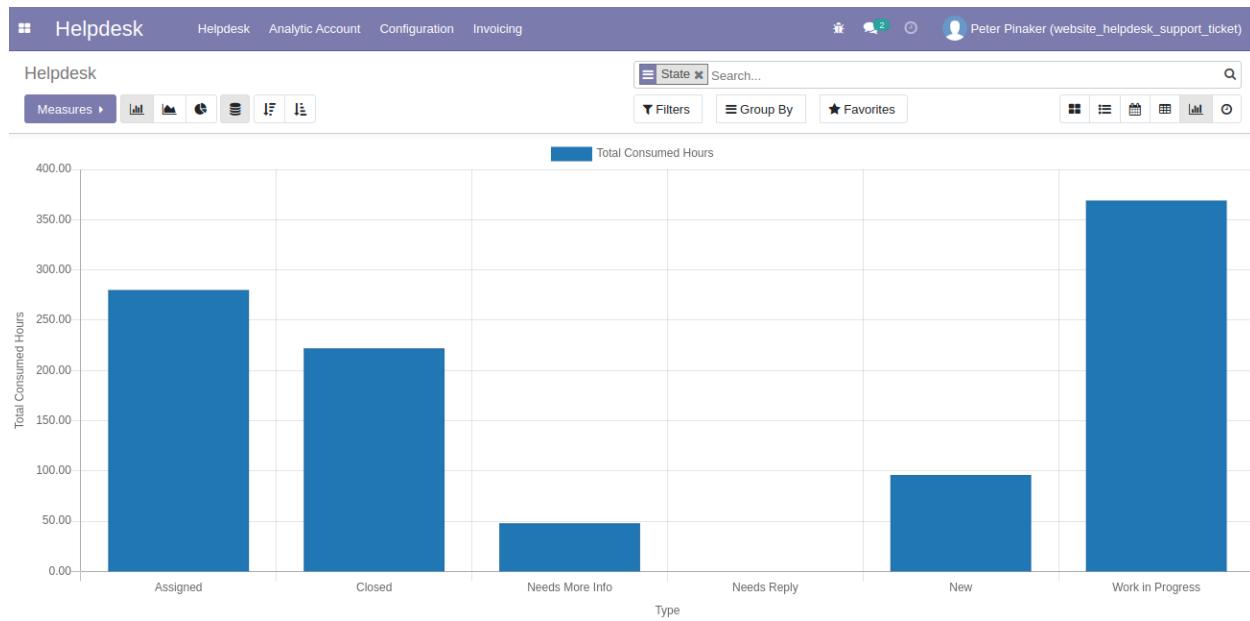
To display the helpdesk ticket pie chart analysis report group by analytic account in the backend.





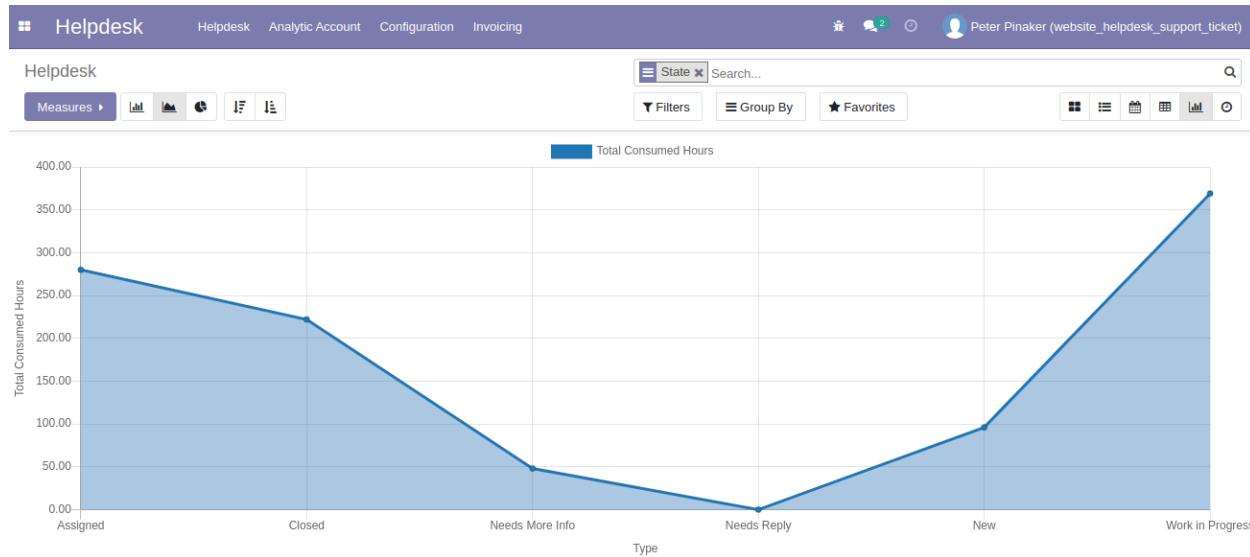
❖ Bar Chart of State in Report [Backend]

To display the helpdesk ticket Bar chart analysis report group by state in the backend.



❖ Line Chart of State in Report [Backend]

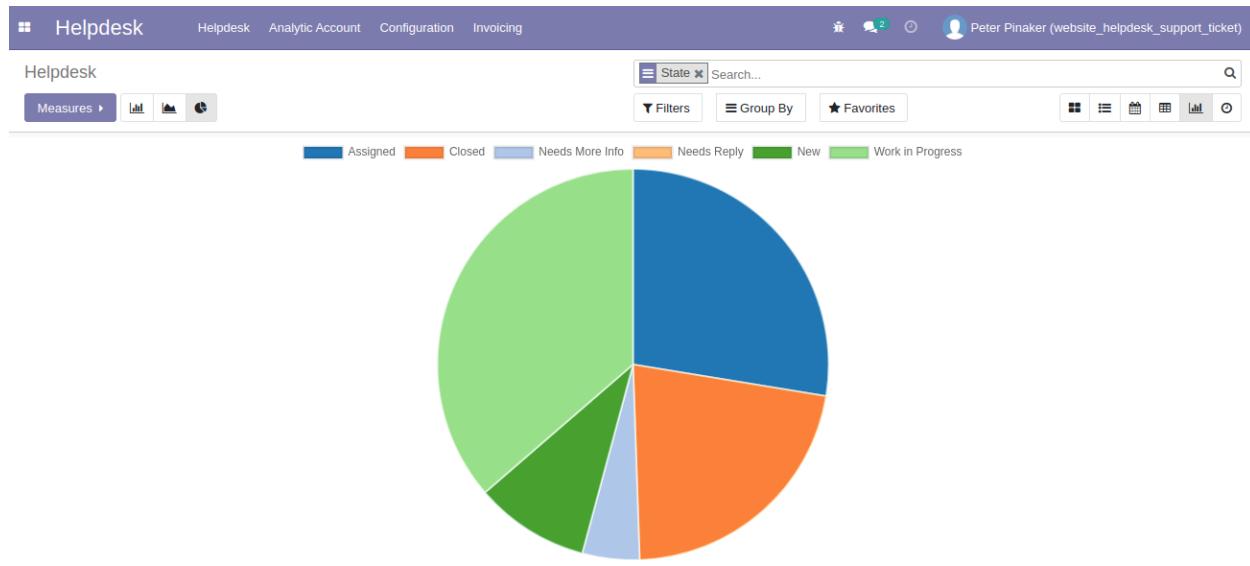
To display the helpdesk ticket line chart analysis report group by state in the backend.





❖ Pie Chart of State in Report [Backend]

To display the helpdesk ticket pie chart analysis report group by state in the backend.





❖ Print PDF Support Ticket Report [Backend]

To print the Helpdesk Support ticket in PDF format.

Helpdesk Helpdesk Analytic Account Configuration Invoicing

Peter Pinaker (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

Print Action

1 / 22 < >

Re Open Print Support Request Pending Work in Progress Needs More Info Needs Reply Reopened Solution Suggested Closed

Create Invoice Tasks Invoice Analytic Account

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz								
Type of Subject	Functional Issue	Customer Name	Colleen Diaz								
Assign To	Martin Luther	Phone	(255)-595-8393								
Email	colleen.diaz83@example.com	Allow Users	Martin Luther, Mitchell Admin, Peter Pinaker								
Company	Probuse Consulting Service Pvt. Ltd.										
Tasks	Technical Problems Of Business In...										
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker								
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict								
Department	Professional Services	Priority	Low								
		Category	Technical								
Create Date	07/14/2021 18:30:19	Close Date	07/07/2021 10:56:40								
Is Ticket Closed ?	<input checked="" type="checkbox"/>	Total Hours Spent	30:00								
To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.											
<table border="1"> <tbody> <tr> <td>Total Consumed Hours</td> <td>22:00</td> </tr> <tr> <td>Total Purchase Hours</td> <td>00:00</td> </tr> <tr> <td>Remaining Hours</td> <td>-22:00</td> </tr> <tr> <td>Balance Remaining Hours</td> <td>-22:00</td> </tr> </tbody> </table>				Total Consumed Hours	22:00	Total Purchase Hours	00:00	Remaining Hours	-22:00	Balance Remaining Hours	-22:00
Total Consumed Hours	22:00										
Total Purchase Hours	00:00										
Remaining Hours	-22:00										
Balance Remaining Hours	-22:00										
<p>Description Timesheets Add Invoice Lines General Information Customer Rating</p> <p>Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view.</p>											



❖ Print PDF Support Ticket Report [Backend]



Probuse Consulting Service Pvt. Ltd.
 SAKAR IX, Beside Old Reserve Bank of India
 Ashram Road, near City Gold
 Ahmedabad 380009
 Gujarat GJ
 India

TICKET/00022 - Technical Problems Of Business Intelligence Software [Closed]

Assigned To	Martin Luther	Customer	Azure Interior, Colleen Diaz
Email	colleen.diaz83@example.com	Phone	(255)-595-8393
Company	Probuse Consulting Service Pvt. Ltd.		

Support Team	Technical Support	Team Leader	Peter Pinaker
Department	Professional Services	Analytic Account	[AGR] S00020 - Deco Addict
Project	AGR - S00020	Priority	Low

Create Date	07/14/2021 18:30:19	Close Date	07/07/2021 10:56:40
Is Ticket Closed ?	True	Total Hours Spent	30:00

Description

Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view.

Timesheets

Name	Analytic Account	Helpdesk Support	Billable	Description	Hours
07/08/2021	[AGR] S00020 - Deco Addict	TICKET/00022	True	/	10:00
07/07/2021	Internal Gap Analysis	TICKET/00022	True	/	05:00
07/06/2021	E-Learning Integration	TICKET/00022	True	/	10:00
07/06/2021	E-Learning Integration	TICKET/00022	True	/	05:00



❖ Analytic Account Menu inside Helpdesk [Backend]

To Display the List of Analytic Accounts can be used in Helpdesk.

Analytic Accounts							
Analytic Accounts				Search...			
				Filters		Group By	Favorites
	Name	Reference	Customer	Company	Debit	Credit	Balance
<input type="checkbox"/>	S00020	AGR	Deco Addict	Probuse Consulting Service Pvt. Ltd.	4,200.00	0.00	-4,200.00
<input type="checkbox"/>	S00021	DPC	Ready Mat	Probuse Consulting Service Pvt. Ltd.	4,275.00	0.00	-4,275.00
<input type="checkbox"/>	After-Sales Services	INT		Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Administrative			Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Asustek		Wood Corner	Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Camp to Camp		Azure Interior	Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	CampToCamp		Azure Interior	Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Commercial & Marketing			Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Deco Addict		Deco Addict	Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Delta PC		Ready Mat	Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Desertic - Hispanfuentes		Azure Interior	Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	E-Learning Integration			Probuse Consulting Service Pvt. Ltd.	1,000.00	0.00	-1,000.00
<input type="checkbox"/>	Internal			Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Internal Gap Analysis			Probuse Consulting Service Pvt. Ltd.	500.00	0.00	-500.00
<input type="checkbox"/>	Lumber Inc		Lumber Inc	Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Luminous Technologies		Gemini Furniture	Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Millennium Industries		Gemini Furniture	Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00
<input type="checkbox"/>	Nebula		Azure Interior	Probuse Consulting Service Pvt. Ltd.	0.00	0.00	0.00

❖ Prepaid Hours Configuration on Customer Analytic Account

To set the Prepaid hours on customer analytic account.

Helpdesk / TICKET/00022 / [AGR] S00020 - Deco Addict																																															
Edit		Create		Action																																											
Helpdesk / TICKET/00022 / [AGR] S00020 - Deco Addict																																															
1 / 1																																															
<input type="checkbox"/>	S00020			\$ Cost/Revenue	1 Projects																																										
Reference	AGR	Customer	Deco Addict	Group	Probuse Consulting Service Pvt. Ltd.																																										
Customer	Deco Addict			Company																																											
				Currency	USD																																										
<table border="1"> <tr> <td>Prepaid Hours</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Sales Order</td><td>Date of Sales Order</td><td></td><td></td><td></td><td></td><td></td><td>Purchased Hours</td> </tr> <tr> <td>S00020</td><td>07/07/2021</td><td></td><td></td><td></td><td></td><td></td><td>22.00</td> </tr> <tr> <td>S00005</td><td>07/07/2021</td><td></td><td></td><td></td><td></td><td></td><td>25.00</td> </tr> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>								Prepaid Hours								Sales Order	Date of Sales Order						Purchased Hours	S00020	07/07/2021						22.00	S00005	07/07/2021						25.00								
Prepaid Hours																																															
Sales Order	Date of Sales Order						Purchased Hours																																								
S00020	07/07/2021						22.00																																								
S00005	07/07/2021						25.00																																								



❖ Show Status of Prepaid Hours on Ticket [Backend]

To display the prepared hours of a customer ticket on click on the analytic account button.

Helpdesk Helpdesk Analytic Account Configuration Invoicing

Peter Pinaker (website_helpdesk_support_ticket)

Helpdesk / TICKET/00022

Re Open Edit Create Print Action 22 / 22 < >

New > Assigned > Work in Progress > Needs More Info > Needs Reply > Reopened > Solution Suggested > Closed

Create Invoice Tasks Invoice Analytic Account

TICKET/00022

Technical Problems Of Business Intelligence Software

Type of Ticket	Technical	Customer	Azure Interior, Colleen Diaz
Type of Subject	Functional Issue	Customer Name	Colleen Diaz
Assign To	Martin Luther	Phone	(255)-595-8393
Email	colleen.diaz83@example.com	Allow Users	(Martin Luther) (Mitchell Admin) (Peter Pinaker)
Company	Probuse Consulting Service Pvt. Ltd.		
Tasks	Technical Problems Of Business In...		
Helpdesk Team	Technical Support	Team Leader	Peter Pinaker
Project	AGR - S00020	Analytic Account	[AGR] S00020 - Deco Addict
Department	Professional Services	Priority	Low
		Category	Technical
Create Date	07/14/2021 18:30:19	Close Date	07/07/2021 10:56:40
Is Ticket Closed ?	<input checked="" type="checkbox"/>	Total Hours Spent	30:00
To view current status of Customer Prepaid/Postpaid Support Hours/Package please click Analytic Account Button.			
Total Consumed Hours 22:00 Total Purchase Hours 00:00 Remaining Hours -22:00 Balance Remaining Hours -22:00			
Description Timesheets Add Invoice Lines General Information Customer Rating			
Your Workforce mobile you BI solution be too but the really is few BI vendors have a mobile strategy and if they do , its functionally is disappointing or limited to read only view.			



❖ Configure Rate on Customer Form

Section to Show Customer Invoice Creation from Timesheet Lines / Timesheets Activities [Backend]

The screenshot shows the Odoo Contacts module. At the top, there is a navigation bar with tabs for 'Contacts', 'Contacts', and 'Configuration'. On the right, there is a user profile for 'Peter Pinaker (website_helpdesk_support_ticket)'. Below the navigation bar, the page title is 'Contacts / Azure Interior, Colleen Diaz'. There are buttons for 'Edit' and 'Create' on the left, and an 'Action' button on the right. The main content area displays a summary of Colleen Diaz's data: 0 Opportunities, 0 Meetings, \$ 0 Sales, 1 Tasks, \$ 0.00 Invoiced, and 21 Tickets. A small profile picture of Colleen Diaz is shown on the right. Below this, the contact details are listed in a grid format. The 'Sales & Purchase' tab is selected. Under 'Sales', it shows Salesperson, Sales Team, Payment Terms, and a note that End of Following Month. Under 'Purchase', it shows Payment Terms and Payment Method, both set to 'End of Following Month'. Under 'Fiscal Information', it shows Fiscal Position and a table for Price / Rate, Company Currency, and Product. The 'Product' row is highlighted with a red border. Under 'Misc', it shows Reference, Company, and Website.

Price / Rate (Company Currency)	1,000.00
Product	[E-COM07] Large Cabinet



❖ View Tickets on Customer Form [Backend]

To display the list of tickets can be created by the customer on the Tickets button on Customer Form.

Contacts Contacts Configuration

Peter Pinaker (website_helpdesk_support_ticket)

Contacts / Azure Interior, Colleen Diaz

Edit Create Action 3 / 40

Opportunities	Meetings	Sales	Tasks	Invoiced	Tickets
0	0	\$ 0	1	\$ 0.00	21

Colleen Diaz
Azure Interior



Address Type	Contact	Job Position	Business Executive
Company Address	4557 De Silva St Fremont, California (US) 94538 United States	Phone	(255)-595-8393 SMS
Tax ID		Mobile	
		Email	colleen.diaz83@example.com
		Website Link	
		Title	
		Tags	

Contacts & Addresses Sales & Purchase Invoicing **Helpdesk Tickets** Internal Notes

Number	Subject	Type of Ticket	Assign To	Customer	Email	Phone	Category	Priority	Type	Company
TICKET/00022	Technical Problem	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Low	Closed	Probuse Cons...
TICKET/00020	Power Supply ...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	High	New	Probuse Cons...
TICKET/00019	Errors In Progra...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	High	Work in Progress	Probuse Cons...
TICKET/00018	Computer does not...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Low	Needs Reply	Probuse Cons...
TICKET/00017	The Wireless Netw...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Low	Work in Progress	Probuse Cons...
TICKET/00016	BYOD Network ...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Low	New	Probuse Cons...
TICKET/00015	Adobe Acrobat ...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Middle	New	Probuse Cons...
TICKET/00014	Third-Party Sof ...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Middle	Needs More Info	Probuse Cons...
TICKET/00013	Video Confere ...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Middle	Assigned	Probuse Cons...
TICKET/00012	Printer Problems	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Middle	Assigned	Probuse Cons...
TICKET/00011	Restoring Files	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Middle	Work in Progress	Probuse Cons...
TICKET/00010	The Computer is s...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Low	New	Probuse Cons...
TICKET/00009	Storage Issue ...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Functional	Middle	Needs More Info	Probuse Cons...
TICKET/00008	Help Finding S...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	High	Needs Reply	Probuse Cons...
TICKET/00007	Invoice Issue	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Low	Assigned	Probuse Cons...
TICKET/00006	Issue Updating ...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Functional	Middle	Work in Progress	Probuse Cons...
TICKET/00005	Operating Syst...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Middle	New	Probuse Cons...
TICKET/00004	Trouble Shooti...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	High	Needs More Info	Probuse Cons...
TICKET/00003	OutSourcing Te...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Middle	Assigned	Probuse Cons...
TICKET/00002	Technical Proble...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Functional	Low	Needs Reply	Probuse Cons...
TICKET/00001	Request for Fe...	Technical	Martin Luther	Azure Interior, ...	colleen.diaz83...	(255)-595-8393	Technical	Low	Needs More Info	Probuse Cons...



❖ Fetch Rate from Customer Form on Project - Editable [Backend]

To set the Price Rate and Product on Project Form from the customer on project.

Project Projects Tasks Reporting Configuration

Projects / E-Learning Integration

Edit Create Action 4 / 8 Share

E-Learning Integration

Name of the tasks: Tasks

Description Settings

Project Manager	Martin Luther	Analytic Account	E-Learning Integration
Customer	Azure Interior, Colleen Diaz	Visibility	Invited portal users and all internal users
Price / Rate	1,000.00	Allowed Portal Users	Colleen Diaz
(Company Currency)		Company	Probuse Consulting Service Pvt. Ltd.
Product	[E-COM07] Large Cabinet		
Phone	(255)-595-8393		
Email	colleen.diaz83@example.com		

❖ Fetch Rate from Project Form on Task - Editable [Backend]

To Set Price / Rate and Product on Task From Selected Project on Task.

Project Projects Tasks Reporting Configuration

Projects / E-Learning Integration / Tasks / Planning and Budget

Edit Create Action 1 / 1

Planning and Budget

Project	E-Learning Integration	Customer	Azure Interior, Colleen Diaz
Assigned to	Peter Pinaker	Price / Rate	1,000.00
Parent Task		(Company Currency)	
Deadline		Product	[E-COM07] Large Cabinet
Recurrent			
Tags			

Description Timesheets Extra Info



❖ Timesheet Lines to Create Customer Invoices [Backend]

The timesheet lines system will display only billable timesheet lines which have not been invoiced yet. Select timesheet lines for which you want to create a customer invoice. Click on Make Invoice wizard action to create customer invoice.

Screenshot of a software interface showing a list of billable timesheets. The interface includes a navigation bar with "Helpdesk", "Helpdesk", "Analytic Account", "Configuration", "Invoicing", and a user profile for "Peter Pinaker (website_helpdesk_support_ticket)". Below the navigation bar is a search bar with "Billable Timesheets" and a "Search..." placeholder, along with "Filters", "Group By", and "Favorites" buttons. The main area displays a table of timesheet entries with columns: "Timesheet to Invoice", "Create", "Date", "Employee", "Project", "Task", "Helpdesk Support", "Billable", "Time In", "Time Out", "Description", and "Duration (Hours)".

Timesheet to Invoice	Create	Date	Employee	Project	Task	Helpdesk Support	Billable	Time In	Time Out	Description	Duration (Hours)
		07/08/2021	Abigail Peterson	AGR - S00020		TICKET/00022	<input checked="" type="checkbox"/>	10:00	20:00	/	10:00
		07/07/2021	Abigail Peterson	Internal Gap Analysis		TICKET/00022	<input checked="" type="checkbox"/>	10:00	15:00	/	05:00
		07/06/2021	Abigail Peterson	E-Learning Integration		TICKET/00022	<input checked="" type="checkbox"/>	10:00	20:00	/	10:00
		07/06/2021	Abigail Peterson	E-Learning Integration		TICKET/00022	<input checked="" type="checkbox"/>	10:00	15:00	/	05:00
		07/06/2021					<input checked="" type="checkbox"/>	00:00	00:00	Hotel Accommodation	01:00
		07/06/2021					<input checked="" type="checkbox"/>	00:00	00:00	[FURN_7800] Desk Comb...	15:00
		07/06/2021					<input checked="" type="checkbox"/>	00:00	00:00	Restaurant Expenses	01:00
		07/06/2021					<input checked="" type="checkbox"/>	00:00	00:00	[FURN_7800] Desk Comb...	10:00
		07/06/2021	Marc Demo	DPC - S00021	Junior Architect (Invoice o...)		<input checked="" type="checkbox"/>	00:00	00:00	Repair	08:00
		07/06/2021	Mitchell Admin	AGR - S00020	Senior Architect (Invoice o...)		<input checked="" type="checkbox"/>	00:00	00:00	Assembling	05:00
		07/06/2021	Mitchell Admin	Internal	Training		<input checked="" type="checkbox"/>	00:00	00:00	Analysis	00:00
		07/06/2021	Mitchell Admin	Internal	Meeting		<input checked="" type="checkbox"/>	00:00	00:00	Analysis	00:00
		07/05/2021	Toni Jimenez	AGR - S00020	Furniture Delivery		<input checked="" type="checkbox"/>	00:00	00:00	On Site Visit	01:00
		07/05/2021	Mitchell Admin	AGR - S00020	Furniture Delivery		<input checked="" type="checkbox"/>	00:00	00:00	Quality analysis	02:00
		07/05/2021	Abigail Peterson	AGR - S00020	Planning		<input checked="" type="checkbox"/>	00:00	00:00	Design	01:00
		07/05/2021	Ronnie Hart	AGR - S00020	Planning		<input checked="" type="checkbox"/>	00:00	00:00	Sprint	02:00
		07/05/2021	Anita Oliver	AGR - S00020	Furniture		<input checked="" type="checkbox"/>	00:00	00:00	Call	02:00
		07/05/2021	Walter Horton	AGR - S00020	Furniture		<input checked="" type="checkbox"/>	00:00	00:00	On Site Visit	03:00



To Select List of Timesheet to Invoice and Click on Action Menu To Click on Make Invoice.

The screenshot shows the Odoo interface for managing billable timesheets. The top navigation bar includes 'Helpdesk', 'Helpdesk', 'Analytic Account', 'Configuration', and 'Invoicing'. The main title is 'Timesheet to Invoice'. Below the title, there are buttons for 'Create' and '4 selected'. On the right, there are buttons for 'Print', 'Action', 'Filters', 'Group By', and 'Favorites'. A search bar is also present. The main content area displays a list of timesheets with columns for Date, Employee, Project, Task, Billable, Time In, Time Out, Description, and Duration (Hours). A context menu is open over the fourth row, showing options: 'Export', 'Delete', and 'Make Invoice'. The 'Make Invoice' option is highlighted with a red box. The data in the table is as follows:

Date	Employee	Project	Task	Billable	Time In	Time Out	Description	Duration (Hours)	
07/08/2021	Abigail Peterson	AGR - S00020		<input checked="" type="checkbox"/>	10:00	20:00	/	10:00	
07/07/2021	Abigail Peterson	Internal Gap Analysis		<input checked="" type="checkbox"/>	10:00	15:00	/	05:00	
07/06/2021	Abigail Peterson	E-Learning Integration		TICKET/00022	<input checked="" type="checkbox"/>	10:00	20:00	/	10:00
07/06/2021	Abigail Peterson	E-Learning Integration		TICKET/00022	<input checked="" type="checkbox"/>	10:00	15:00	/	05:00
07/06/2021				<input checked="" type="checkbox"/>	00:00	00:00	Hotel Accommodation	01:00	
07/06/2021				<input checked="" type="checkbox"/>	00:00	00:00	[FURN_7800] Desk Comb...	15:00	
07/06/2021				<input checked="" type="checkbox"/>	00:00	00:00	Restaurant Expenses	01:00	
07/06/2021				<input checked="" type="checkbox"/>	00:00	00:00	[FURN_7800] Desk Comb...	10:00	
07/06/2021	Marc Demo	DPC - S00021	Junior Architect (Invoice o...)	<input checked="" type="checkbox"/>	00:00	00:00	Repair	08:00	
07/06/2021	Mitchell Admin	AGR - S00020	Senior Architect (Invoice o...)	<input checked="" type="checkbox"/>	00:00	00:00	Assembling	05:00	
07/06/2021	Mitchell Admin	Internal	Training	<input checked="" type="checkbox"/>	00:00	00:00	Analysis	00:00	
07/06/2021	Mitchell Admin	Internal	Meeting	<input checked="" type="checkbox"/>	00:00	00:00	Analysis	00:00	
07/05/2021	Toni Jimenez	AGR - S00020	Furniture Delivery	<input checked="" type="checkbox"/>	00:00	00:00	On Site Visit	01:00	
07/05/2021	Mitchell Admin	AGR - S00020	Furniture Delivery	<input checked="" type="checkbox"/>	00:00	00:00	Quality analysis	02:00	
07/05/2021	Abigail Peterson	AGR - S00020	Planning	<input checked="" type="checkbox"/>	00:00	00:00	Design	01:00	
07/05/2021	Dennis Hart	AGR - S00020	Planning	<input checked="" type="checkbox"/>	00:00	00:00	Design	00:00	

❖ Click on Make Invoice Button to open Wizard [Backend]

Click on Make Invoice Button to open Wizard to Click on Create Invoice Button to create Customer Invoice.



Helpdesk

Timesheet to Invoice

Make Invoice

This wizard will create customer invoice for selected timesheet lines...

Date	Emp	Activity	TICKET/00022	10:00	20:00 /	10:00
07/08/2021	Abigail Peterson	E-Learning Integration	TICKET/00022	10:00	15:00 /	05:00
07/06/2021	Abigail Peterson	E-Learning Integration		00:00	00:00 Hotel Accommodation	01:00
07/06/2021				00:00	00:00 [FURN_7800] Desk Comb...	15:00
07/06/2021				00:00	00:00 Restaurant Expenses	01:00
07/06/2021				00:00	00:00 [FURN_7800] Desk Comb...	10:00
07/06/2021	Marc Demo	DPC - S00021	Junior Architect (Invoice o...	00:00	00:00 Repair	08:00
07/06/2021	Mitchell Admin	AGR - S00020	Senior Architect (Invoice o...	00:00	00:00 Assembling	05:00
07/06/2021	Mitchell Admin	Internal	Training	00:00	00:00 Analysis	00:00
07/06/2021	Mitchell Admin	Internal	Meeting	00:00	00:00 Analysis	00:00
07/05/2021	Toni Jimenez	AGR - S00020	Furniture Delivery	00:00	00:00 On Site Visit	01:00
07/05/2021	Mitchell Admin	AGR - S00020	Furniture Delivery	00:00	00:00 Quality analysis	02:00
07/05/2021	Abigail Peterson	AGR - S00020	Planning	00:00	00:00 Design	01:00
07/05/2021	Ronnie Hart	AGR - S00020	Planning	00:00	00:00 Sprint	02:00
07/05/2021	Anita Oliver	AGR - S00020	Furniture	00:00	00:00 Call	02:00
07/05/2021	Walter Horton	AGR - S00020	Furniture	00:00	00:00 On Site Visit	03:00

❖ Created Customer Invoices after Running Wizard [Backend]

Helpdesk

Helpdesk Analytic Account Configuration Invoicing

Timesheet to Invoice / Invoices

Search...

1-3 / 3

<input type="checkbox"/>	Number	Customer	Invoice Date	Due Date	Next Activity	Company	Tax Excluded	Total	Status	Payment Status
<input type="checkbox"/>	I	Deco Addict	In 30 days	<input type="button" value=""/>	Probuse Consulting Service Pvt. Ltd.	\$ 0.00	\$ 0.00	<input type="button" value="Draft"/>	<input type="button" value="Not Paid"/>	
<input type="checkbox"/>	I	Deco Addict	In 30 days	<input type="button" value=""/>	Probuse Consulting Service Pvt. Ltd.	\$ 0.00	\$ 0.00	<input type="button" value="Draft"/>	<input type="button" value="Not Paid"/>	
<input type="checkbox"/>	I	Deco Addict	In 30 days	<input type="button" value=""/>	Probuse Consulting Service Pvt. Ltd.	\$ 15,000.00	\$ 15,000.00	<input type="button" value="Draft"/>	<input type="button" value="Not Paid"/>	
							15,000.00	15,000.00		



❖ Customer Invoice Form View Sample [Backend]

To Display Created Invoice From Timesheet Invoice Line.

The screenshot shows the Odoo Customer Invoice form in draft mode. The customer is Deco Addict, located at 77 Santa Barbara Rd, Pleasant Hill CA 94523, United States. The invoice date is set to 30 Days. The table below lists a single invoice line: // Time In 10:0 / Time Out 20:0 400000 Product Sales [AGR] S00020 - Deco Addict, with a quantity of 10.00, price of 100.00, and subtotal of \$ 1,000.00.

Product	Label	Account	Analytic Account	Analytic Tags	Quantity	UoM	Price	Taxes	Subtotal
					10.00		100.00		\$ 1,000.00

To Display Created Invoice From Timesheet Invoice Line.

The screenshot shows the Odoo Customer Invoice form in draft mode. The customer is Deco Addict, located at 77 Santa Barbara Rd, Pleasant Hill CA 94523, United States. The invoice date is set to 30 Days. The table below lists a single invoice line: // Time In 10:0 / Time Out 15:0 400000 Product Sales Internal Gap Analysis, with a quantity of 5.00, price of 140.00, and subtotal of \$ 700.00.

Product	Label	Account	Analytic Account	Analytic Tags	Quantity	UoM	Price	Taxes	Subtotal
					5.00		140.00		\$ 700.00



To Display Created Invoice From Timesheet Invoice Line.

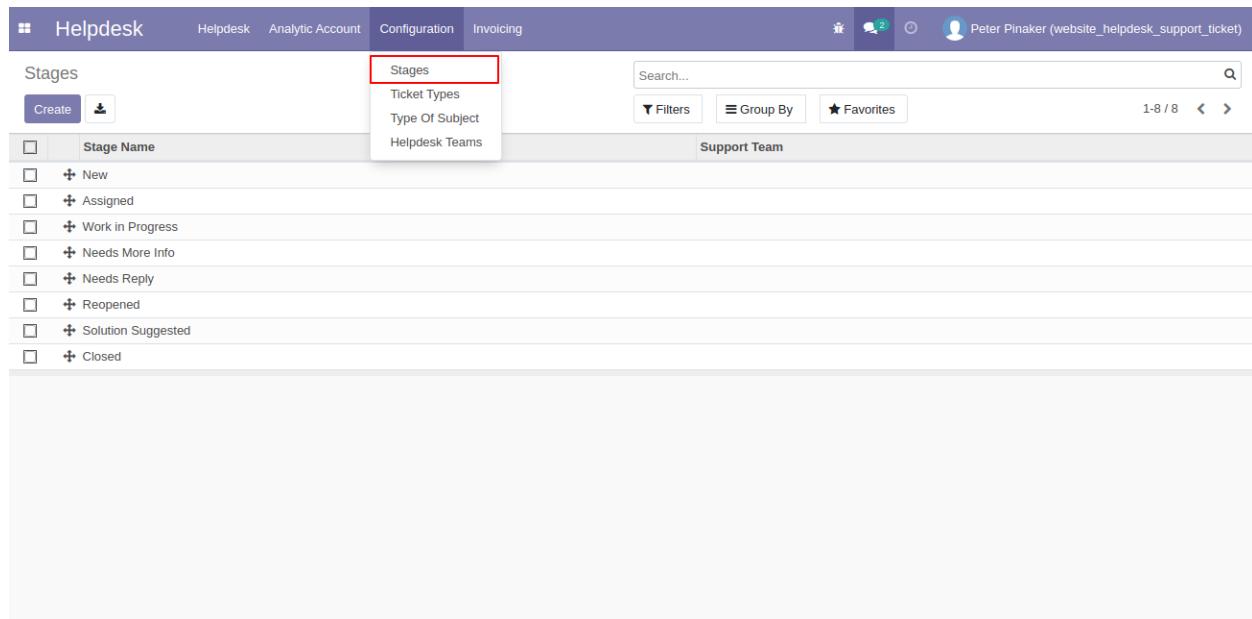
❖ Billable, Time In and Time Out on Timesheet [Backend]

Date	Employee	Project	Task	Helpdesk Support	Billable	Time In	Time Out	Description	Duration (Hours)
07/06/2021	Abigail Peterson	E-Learning Integration		TICKET/00022	<input checked="" type="checkbox"/>	10:00	15:00	/	05:00
07/06/2021	Abigail Peterson	E-Learning Integration		TICKET/00022	<input checked="" type="checkbox"/>	10:00	20:00	/	10:00
07/07/2021	Abigail Peterson	Internal Gap Analysis		TICKET/00022	<input checked="" type="checkbox"/>	10:00	15:00	/	05:00
07/08/2021	Abigail Peterson	AGR - S00020		TICKET/00022	<input checked="" type="checkbox"/>	10:00	20:00	/	10:00
02/21/2021	Mitchell Admin	Office Design	Internal training		<input checked="" type="checkbox"/>	00:00	00:00	Internal discussion	08:00
02/22/2021	Mitchell Admin	Office Design	Internal training		<input checked="" type="checkbox"/>	00:00	00:00	Internal training	08:00
02/23/2021	Marc Demo	Office Design	Internal training		<input checked="" type="checkbox"/>	00:00	00:00	Details improvement	08:00
02/24/2021	Mitchell Admin	Office Design	Internal training		<input checked="" type="checkbox"/>	00:00	00:00	Technical training	08:00
05/07/2021	Abigail Peterson	Research & Development	Document management		<input checked="" type="checkbox"/>	00:00	00:00	Delivery	02:00
05/07/2021	Marc Demo	Office Design	Meeting Room Furnitures		<input checked="" type="checkbox"/>	00:00	00:00	Requirements analysis	01:00
05/07/2021	Rachel Perry	Office Design	Lunch Room: kitchen		<input checked="" type="checkbox"/>	00:00	00:00	Call	01:00
05/07/2021	Eli Lambert	Research & Development	Usability review		<input checked="" type="checkbox"/>	00:00	00:00	Quality analysis	01:00
05/07/2021	Tina Williamson	Office Design	Room 1: Decoration		<input checked="" type="checkbox"/>	00:00	00:00	Delivery	03:00
05/07/2021	Walter Horton	Research & Development	Planning and budget		<input checked="" type="checkbox"/>	00:00	00:00	Requirements analysis	01:00
05/08/2021	Walter Horton	Office Design	Meeting Room Furnitures		<input checked="" type="checkbox"/>	00:00	00:00	Requirements analysis	01:00
05/08/2021	Mitchell Admin	Research & Development	Planning and budget		<input checked="" type="checkbox"/>	00:00	00:00	Requirements analysis	01:00
05/08/2021	Ronnie Hart	Research & Development	User interface improvements		<input checked="" type="checkbox"/>	00:00	00:00	Call	03:00
05/08/2021	Marc Demo	Office Design	Black Chairs for managers		<input checked="" type="checkbox"/>	00:00	00:00	Quality analysis	01:00



❖ Helpdesk Stages [Backend]

List of stages are set on Helpdesk Ticket in Header to change the ticket status.

A screenshot of the Odoo Helpdesk Stages module. The top navigation bar shows "Helpdesk", "Helpdesk", "Analytic Account", "Configuration", and "Invoicing". The "Configuration" tab is selected. On the right, a user "Peter Pinaker (website_helpdesk_support_ticket)" is logged in. The main area is titled "Stages" and contains a list of stages: "New", "Assigned", "Work in Progress", "Needs More Info", "Needs Reply", "Reopened", "Solution Suggested", and "Closed". Each stage has a checkbox and a plus sign icon. To the right of the list are buttons for "Search...", "Filters", "Group By", and "Favorites". A page number "1-8 / 8" and navigation arrows are also present.

❖ Helpdesk Ticket Types [Backend]

A list of ticket types can be set on the ticket.



This screenshot shows the Odoo Helpdesk module's configuration screen for 'Ticket Type'. The top navigation bar includes 'Helpdesk', 'Helpdesk', 'Analytic Account', 'Configuration', and 'Invoicing'. The 'Configuration' tab is active. The main area is titled 'Ticket Type' and contains a 'Create' button and a 'Ticket Types' button. A dropdown menu is open over the 'Ticket Types' button, showing options: 'Stages', 'Ticket Types' (which is highlighted with a red box), 'Type Of Subject', and 'Helpdesk Teams'. To the right of the dropdown are search and filter buttons ('Search...', 'Filters', 'Group By', 'Favorites'). The bottom of the screen shows a list of ticket types with checkboxes for 'Name', 'Technical', and 'Functional'.

❖ Helpdesk Type Of Subject

To Set the Subject on Helpdesk Ticket.

This screenshot shows the Odoo Helpdesk module's configuration screen for 'Type Of Subject'. The top navigation bar includes 'Helpdesk', 'Helpdesk', 'Analytic Account', 'Configuration', and 'Invoicing'. The 'Configuration' tab is active. The main area is titled 'Type Of Subject' and contains a 'Create' button and a 'Type Of Subject' button. A dropdown menu is open over the 'Type Of Subject' button, showing options: 'Stages', 'Ticket Types', and 'Type Of Subject' (which is highlighted with a red box). To the right of the dropdown are search and filter buttons ('Search...', 'Filters', 'Group By', 'Favorites'). The bottom of the screen shows a list of subject types with checkboxes for 'Name', 'Functional Issue', and 'Technical Issue'.

❖ Search And Show Tickets [Portal]

Customer or Portal User can Search the Ticket with Ticket Number to show the status of ticket.



Home Create Ticket Show Tickets Search Tickets Contact us

Colleen Diaz ▾

Contact Us

Ticket Status

Check status of previously opened tickets. we provide archives and history of all support your requests compete with responses.



Ticket Number

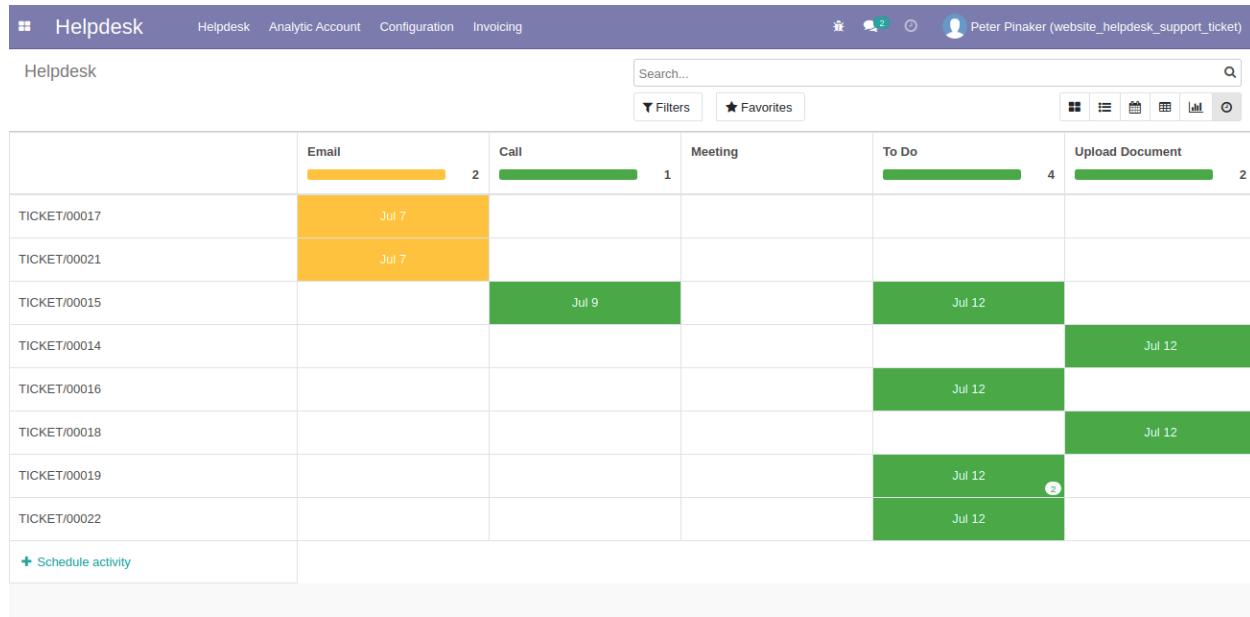
TICKET/00022

Check Status



❖ Ticket Activity View [Backend]

To Display the List of Helpdesk Tickets in Different Activities in View. Like Email, Call , Meeting, To Do, Upload Document.





❖ Support Ticket with Clock Activities button [Backend]

To display the Clock activity button on the helpdesk ticket kanban view.

This screenshot shows the Odoo Helpdesk Kanban view. The interface includes a top navigation bar with 'Helpdesk', 'Helpdesk', 'Analytic Account', 'Configuration', and 'Invoicing'. The main area is titled 'Helpdesk' with a 'Create' button. A search bar and filter/group by options are at the top right. The Kanban board is divided into five columns: 'New', 'Assigned', 'Work in Progress', 'Needs More Info', and 'Needs Reply'. Each column contains several ticket cards, each with a ticket ID, subject, assignee, and creation date. In the 'Work in Progress' column, the ticket 'TICKET/00021' has a clock icon in its status cell, indicating an active clock activity. The ticket 'TICKET/00019' in the same column also has a clock icon.

❖ Support Ticket with Clock Activities [Backend]

To Display the Which Activity can be performed on the Ticket.

This screenshot shows the Odoo Helpdesk Kanban view with a focus on the 'Work in Progress' column. The ticket 'TICKET/00021' is selected. A detailed activity list is displayed in a modal-like overlay. The activities are categorized into 'Today', 'Planned', and 'To Do'. Under 'Today', there is an 'Email' activity. Under 'Planned', there is a 'Call' activity with a 'Due in 2 days' option. Under 'To Do', there is a 'To Do' activity with a 'Due in 5 days' option. A red box highlights the 'Planned' section. At the bottom of the activity list, there is a button labeled '+ Schedule an activity'.



❖ Helpdesk Support Ticket New Groups (Support Manager ==> Peter Pinaker) [Backend]

Users / Peter Pinaker

Edit Create Action 6 / 6 < > Never Connected Confirmed

Send an Invitation Email Create employee

47 Groups 453 Access Rights 61 Record Rules

Peter Pinaker
peter.pinaker@example.com

Related Partner Peter Pinaker

Access Rights Preferences

User Type
User types Internal User

Sales
Sales Administrator

Services
Project Administrator
Timesheets Administrator

Accounting
Invoicing Billing Administrator

Website
Website Editor and Designer

Human Resources
Employees Administrator

Administration
Administration

Technical

A warning can be set on a partner (Account)	<input checked="" type="checkbox"/>	A warning can be set on a product or a customer (Sale)	<input checked="" type="checkbox"/>
Access to Private Addresses	<input checked="" type="checkbox"/>	Access to export feature	<input checked="" type="checkbox"/>
Addresses in Sales Orders	<input checked="" type="checkbox"/>	Advanced Pricelists	<input checked="" type="checkbox"/>
Allow the cash rounding management	<input checked="" type="checkbox"/>	Analytic Accounting	<input checked="" type="checkbox"/>
Analytic Accounting Tags	<input checked="" type="checkbox"/>	Basic Pricelists	<input checked="" type="checkbox"/>
Discount on lines	<input checked="" type="checkbox"/>	Lock Confirmed Sales	<input type="checkbox"/>
Manage Multiple Units of Measure	<input checked="" type="checkbox"/>	Manage Product Packaging	<input checked="" type="checkbox"/>
Manage Product Variants	<input checked="" type="checkbox"/>	Multi-website	<input checked="" type="checkbox"/>
Pro-forma Invoices	<input checked="" type="checkbox"/>	Purchase Receipt	<input checked="" type="checkbox"/>
Quotation Templates	<input checked="" type="checkbox"/>	Sale Receipt	<input checked="" type="checkbox"/>
Show Accounting Features - Readonly	<input checked="" type="checkbox"/>	Show Full Accounting Features	<input checked="" type="checkbox"/>
Show Lead Menu	<input checked="" type="checkbox"/>	Show Recurring Revenues Menu	<input checked="" type="checkbox"/>
Tax display B2B	<input checked="" type="checkbox"/>	Tax display B2C	<input type="checkbox"/>
Use Rating on Project	<input checked="" type="checkbox"/>	Use Recurring Tasks	<input checked="" type="checkbox"/>
Use Subtasks	<input checked="" type="checkbox"/>		

Extra Rights

Contact Creation	<input checked="" type="checkbox"/>	Multi Companies	<input type="checkbox"/>
Multi Currencies	<input checked="" type="checkbox"/>		

Other

Support Manager	<input checked="" type="checkbox"/>	Support User	<input checked="" type="checkbox"/>
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❖ Helpdesk Support Ticket New Groups (Support User ==> Martin Luther) [Backend]

Users / Martin Luther

Edit Create Action 4 / 6 < >

Send Password Reset Instructions Create employee Never Connected Confirmed

46 Groups 445 Access Rights 60 Record Rules

Martin Luther
martin.luther@example.com

Related Partner: Martin Luther

Access Rights Preferences

User Type
User types: Internal User

Sales
Sales: Administrator

Services
Project: Administrator
Timesheets: Administrator

Accounting
Invoicing: Billing Administrator

Website
Website: Editor and Designer

Human Resources
Employees: Administrator

Administration
Administration

Technical

A warning can be set on a partner (Account)	<input checked="" type="checkbox"/>	A warning can be set on a product or a customer (Sale)	<input checked="" type="checkbox"/>
Access to Private Addresses	<input checked="" type="checkbox"/>	Access to export feature	<input checked="" type="checkbox"/>
Addresses in Sales Orders	<input checked="" type="checkbox"/>	Advanced Pricelists	<input checked="" type="checkbox"/>
Allow the cash rounding management	<input checked="" type="checkbox"/>	Analytic Accounting	<input checked="" type="checkbox"/>
Analytic Accounting Tags	<input checked="" type="checkbox"/>	Basic Pricelists	<input checked="" type="checkbox"/>
Discount on lines	<input checked="" type="checkbox"/>	Lock Confirmed Sales	<input type="checkbox"/>
Manage Multiple Units of Measure	<input checked="" type="checkbox"/>	Manage Product Packaging	<input checked="" type="checkbox"/>
Manage Product Variants	<input checked="" type="checkbox"/>	Multi-website	<input checked="" type="checkbox"/>
Pro-forma Invoices	<input checked="" type="checkbox"/>	Purchase Receipt	<input checked="" type="checkbox"/>
Quotation Templates	<input checked="" type="checkbox"/>	Sale Receipt	<input checked="" type="checkbox"/>
Show Accounting Features - Readonly	<input checked="" type="checkbox"/>	Show Full Accounting Features	<input checked="" type="checkbox"/>
Show Lead Menu	<input checked="" type="checkbox"/>	Show Recurring Revenues Menu	<input checked="" type="checkbox"/>
Tax display B2B	<input checked="" type="checkbox"/>	Tax display B2C	<input type="checkbox"/>
Use Rating on Project	<input checked="" type="checkbox"/>	Use Recurring Tasks	<input checked="" type="checkbox"/>
Use Subtasks	<input checked="" type="checkbox"/>		

Extra Rights

Contact Creation	<input checked="" type="checkbox"/>	Multi Companies	<input type="checkbox"/>
Multi Currencies	<input checked="" type="checkbox"/>		

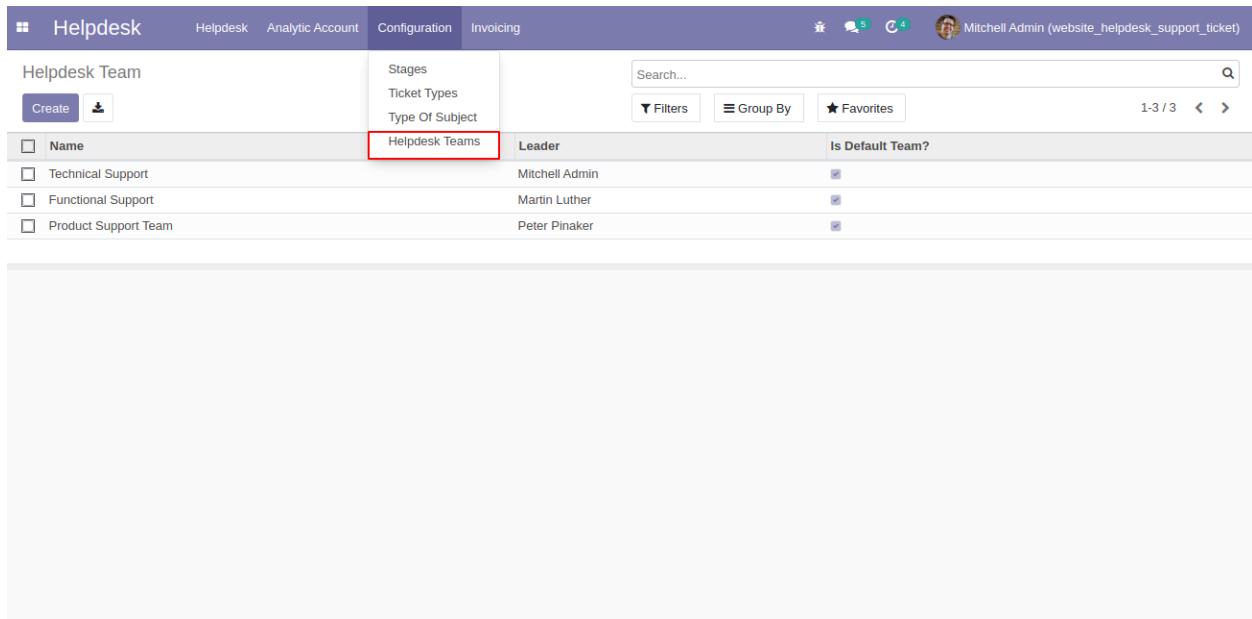
Other

Support Manager	<input type="checkbox"/>	Support User <input checked="" type="checkbox"/>	
Support User <input checked="" type="checkbox"/>			



❖ Support Team List View Configuration [Backend]

You can create a different support team and assign tickets to the support team responsible to do work on that ticket.

A screenshot of the Odoo Helpdesk module's Support Team list view. The top navigation bar shows "Helpdesk" as the active module, with "Helpdesk", "Analytic Account", "Configuration", and "Invoicing" as other options. The "Configuration" tab is selected. On the right, a user profile for "Mitchell Admin (website_helpdesk_support_ticket)" is shown with a small photo, a message icon with 5 notifications, a calendar icon with 4 notifications, and a gear icon. The main content area is titled "Helpdesk Team" and shows a list of support teams. A search bar with a magnifying glass icon is at the top right. Below it are buttons for "Filters", "Group By", and "Favorites". A page navigation bar shows "1-3 / 3" with back and forward arrows. The list table has columns for "Name" (with a checkbox), "Helpdesk Teams" (with a red border around the column header), "Leader" (with dropdown arrows), and "Is Default Team?" (with a checkbox). The data rows are: "Technical Support" (Leader: Mitchell Admin, Is Default Team: checked), "Functional Support" (Leader: Martin Luther, Is Default Team: checked), and "Product Support Team" (Leader: Peter Pinaker, Is Default Team: checked).

Name	Helpdesk Teams	Leader	Is Default Team?
Technical Support	Mitchell Admin	<input checked="" type="checkbox"/>	
Functional Support	Martin Luther	<input checked="" type="checkbox"/>	
Product Support Team	Peter Pinaker	<input checked="" type="checkbox"/>	



❖ Support Team Form View [Backend]

If you set any team as the default team then the ticket created from the website will be set as the default team but later you can change a team on ticket form.

A screenshot of the Odoo Helpdesk Team form. The top navigation bar shows "Helpdesk" as the active module. The main title is "Helpdesk Team / Product Support Team". Below the title, there are buttons for "Edit" and "Create", and a "Action" button. On the right, there are status indicators for "Ticket Count" (5), "Comment Count" (4), and "User Count" (1), along with the user "Mitchell Admin (website_helpdesk_support_ticket)". The main content area shows the "Product Support Team" details: Name (Product Support Team), Is Default Team? (unchecked), Leader (Peter Pinaker), and Team Members. A red box highlights the "Team Members" section, which contains a table with the following data:

Name	Login	Language	Latest authentication	Company	Two-factor authentication
Marc Demo	demo	English (US)		Probuse Consulting Service Pvt. Ltd.	<input type="checkbox"/>
Martin Luther	martin.luther@example.com	English (US)		Probuse Consulting Service Pvt. Ltd.	<input type="checkbox"/>
Mitchell Admin	admin	English (US)	07/06/2021 11:37:38	Probuse Consulting Service Pvt. Ltd.	<input type="checkbox"/>
Peter Pinaker	peter.pinaker@example.com	English (US)		Probuse Consulting Service Pvt. Ltd.	<input type="checkbox"/>



General Notes / Flow:

- Your customer can send support tickets / support requests from your website and customers can also attach documents / files while creating tickets from the website.
- Generation of a unique support ticket on submission and record it as a helpdesk ticket on the backend side of Odoo on ticket form view.
- Allow your customers to create a ticket by email (Sending email to your support email) and so if your customer sends an email to your email system, it will create a ticket automatically. For that you will have to set up *Catchall Email* as an incoming mail server or incoming mail server to create a new record option.
- Customers can check the status of all submitted support tickets by him / her on the My Account page of your website. And if customers have more contacts in the company they can also view tickets submitted by other members of the company too.
- Allow your support team to print Help Desk Support Tickets in PDF format in the backend.
- Support User, Technician and Support manager can communicate with customers using open chatter on ticket form and fill timesheets on the ticket form in the backend.
- The Support Manager can close tickets and send bills to customers. Allow also to create bills/invoices from a list of timesheets which are billable.
- Customers can provide feedback and rating of tickets so when the ticket will be closed, the system will send email to customers for feedback and ratings automatically by email.



- Manage your support tickets using assignments to support teams so the system allows you to select a support team on a ticket form.
- Allow you to view prepaid hours of customers for help desk tickets form.
- Create customer invoices from timesheets as shown in below screenshots.
- System allows you to create project tasks for help desk tickets directly from ticket form view.
- Allows support managers to create invoices from timesheets using the *Make to Invoice* button on timesheets list.
- System allows your user/employee (people working on tickets) to set Time In and Time Out on timesheets.
- Allow your team to create and manage help desk ticket stages under configuration.
- Allow your team to create and manage ticket types under configuration.
- Allow your team to create and manage types of subjects under configuration.
- System also shows activity views for help desk support tickets.
- System will add a page on the website to create tickets, show tickets and search tickets which can be used by your customers.
- For more details about the app please see below screenshots and watch the video in live preview.
- **Video** <https://www.youtube.com/watch?v=q86OEF1KjU>



Menus Items Available:

- Helpdesk
 - Helpdesk
 - Helpdesk Tickets
 - Analytic Account
 - Analytic Accounts
 - Invoicing
 - Timesheets to Invoice
 - Configuration
 - Helpdesk Teams
 - Stages
 - Ticket Types
 - Type Of Subject



Testing Sample Users for PDF:

- *Customer* ==> *Colleen Diaz*
- *Support Manager* ==> *Peter Pinaker*
- *Support User* ==> *Martin Luther*

Roles

Role of Customer

- Customers can create helpdesk support tickets from the website.
- Customers can view submitted requests in the My Account Portal of your website.
- Customers can send messages or attachments in chatter on my account portal.
- Customers can search for tickets on My Account Portal.
- Customers can give the feedback rating on the help desk ticket created by the customer when the ticket will be closed.



Role of Support Manager:

- Manager can Assign Helpdesk Ticket to Support User/Technician.
- Manager can set the Assign to, Allow Users, Project, Team etc on Helpdesk Support Ticket.
- Manager can create a task from the helpdesk ticket form.
- Manager can create a customer invoice from Helpdesk Ticket Request.
- Print Pdf Report of Helpdesk Ticket in the backend.
- The Support Manager can communicate with customers on Helpdesk Ticket using chatter.
- Manager can close the ticket request at the end/close of the help desk ticket.
- Manager also filled the timesheets on the Helpdesk Ticket.
- Manager also Add Invoice Line on Helpdesk Ticket.
- Manager can see the list of Helpdesk tickets created by customers on customer form.
- Managers can Make invoices to Timesheet Lines to Create Customer Invoices [Backend]. [Should have invoice creation rights].
- The Support Manager can also work on assigned tasks related to tickets and also assign tasks to team members.
- Managers can create and manage/set the configuration data like Ticket Type, Ticket Subject, Stages and Helpdesk Teams.
- Generally work which is done by support users / technicians can also be handled and managed by support managers and also managing tickets.
- **The Support Manager can close tickets and send bills to customers. Allow also to create bills/invoices from a list of timesheets which are billable.**
- Movement of ticket from stage to other.



Role of Support User/Technician:

- Support Users can see and manage help desk support tickets assigned by the Support Manager.
- Support Users can work on helpdesk tickets assigned by the support manager.
- Support users can change the stage as per work on Help Desk support tickets.
- Support User / Technician can communicate with Customers on Helpdesk Ticket using chatter.
- Movement of ticket from stage to other.
- Support User can Filling timesheets on ticket form and task form.
- Support Users can add product invoice lines on tickets.
- Support User can Print PDF Report of Help Desk Ticket form backend.
- Support Users can also work on assigned tasks related to tickets.
- Support User can see the configuration data like Ticket Type, Ticket Subject, Stages and Helpdesk Teams on Helpdesk Ticket.
- Support can close the ticket request at the end of the Helpdesk Ticket Solved.