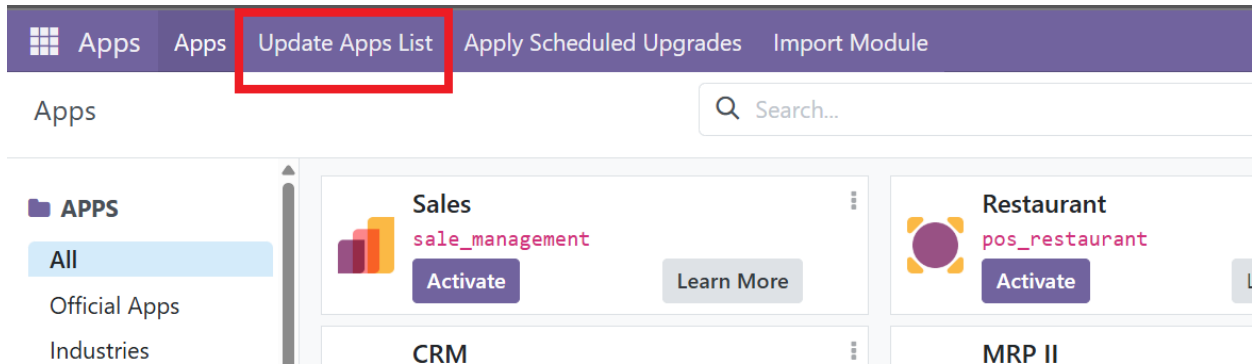
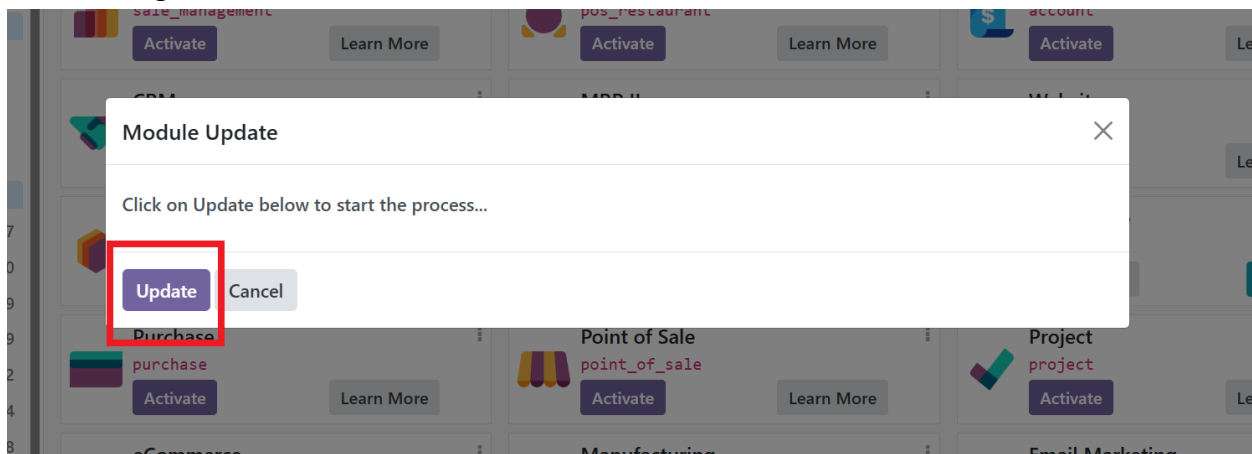


Installation Guide

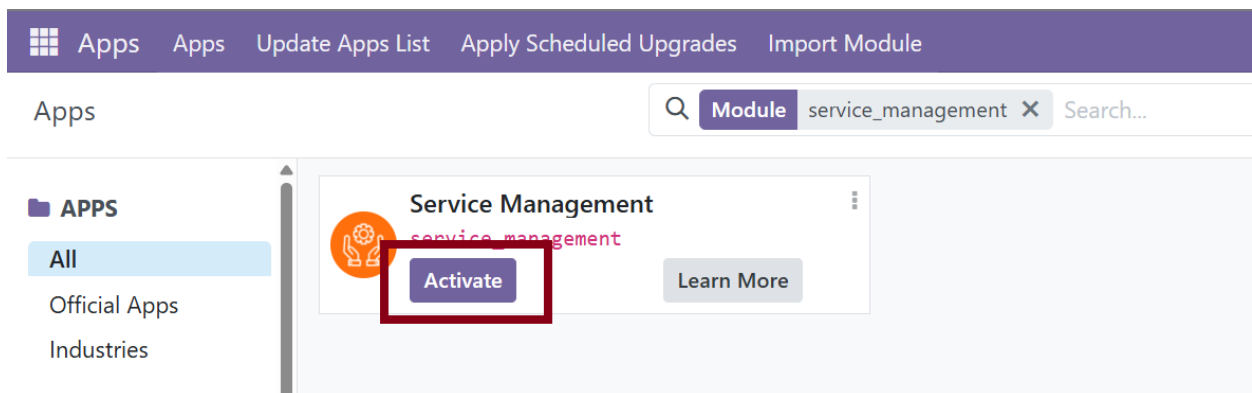
- 1) Copy **service_management** module to **odoo addons**
- 2) Restart odoo server
- 3) Create **demo database** (NOTE: Make sure to check demo field)
- 4) Login to the database
- 5) Go to **Apps -> Update App List**



- 6) In the dialog, click **UPDATE** button



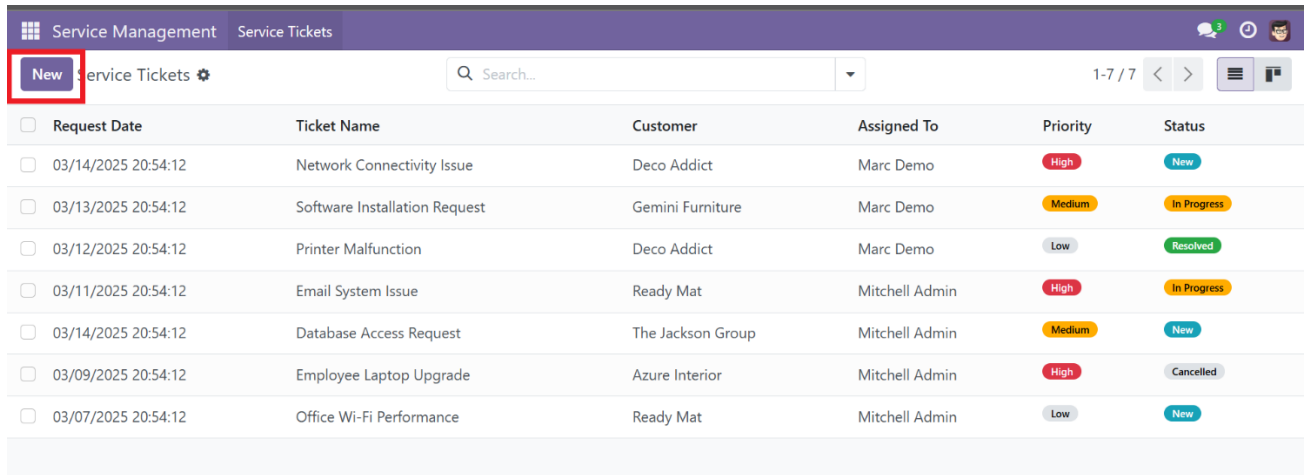
- 7) Search **service_management** in the app list
- 8) Click **ACTIVATE** to install



Usage Guide

1) Creating **NEW** Tickets

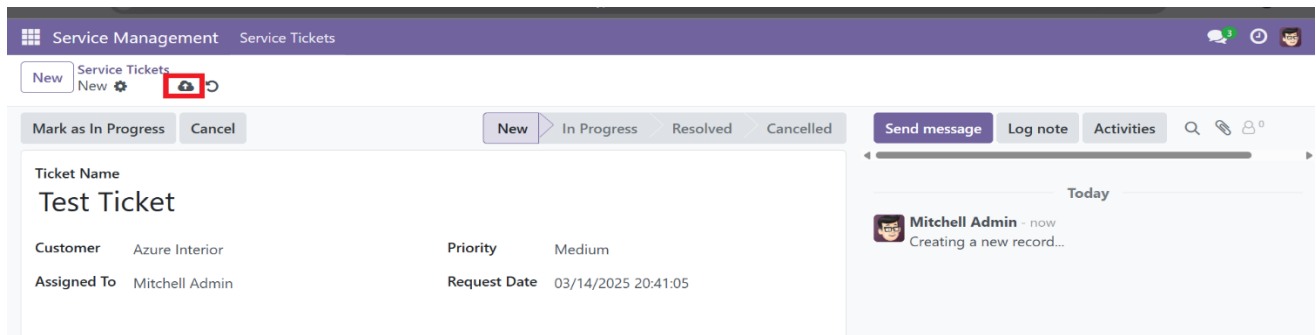
- To create new ticket, click the **CREATE** button in the list view



The screenshot shows the 'Service Management' interface with a 'Service Tickets' tab. A 'New' button is highlighted with a red box. Below it is a table of tickets.

<input type="checkbox"/>	Request Date	Ticket Name	Customer	Assigned To	Priority	Status
<input type="checkbox"/>	03/14/2025 20:54:12	Network Connectivity Issue	Deco Addict	Marc Demo	High	New
<input type="checkbox"/>	03/13/2025 20:54:12	Software Installation Request	Gemini Furniture	Marc Demo	Medium	In Progress
<input type="checkbox"/>	03/12/2025 20:54:12	Printer Malfunction	Deco Addict	Marc Demo	Low	Resolved
<input type="checkbox"/>	03/11/2025 20:54:12	Email System Issue	Ready Mat	Mitchell Admin	High	In Progress
<input type="checkbox"/>	03/14/2025 20:54:12	Database Access Request	The Jackson Group	Mitchell Admin	Medium	New
<input type="checkbox"/>	03/09/2025 20:54:12	Employee Laptop Upgrade	Azure Interior	Mitchell Admin	High	Cancelled
<input type="checkbox"/>	03/07/2025 20:54:12	Office Wi-Fi Performance	Ready Mat	Mitchell Admin	Low	New

- Fill out the form and click **SAVE**



The screenshot shows the 'Service Management' interface with a 'Service Tickets' tab. A 'New' button is highlighted with a red box. Below it is a form for creating a new ticket.

Mark as In Progress **Cancel** **New** **In Progress** **Resolved** **Cancelled** **Send message** **Log note** **Activities**

Ticket Name
Test Ticket

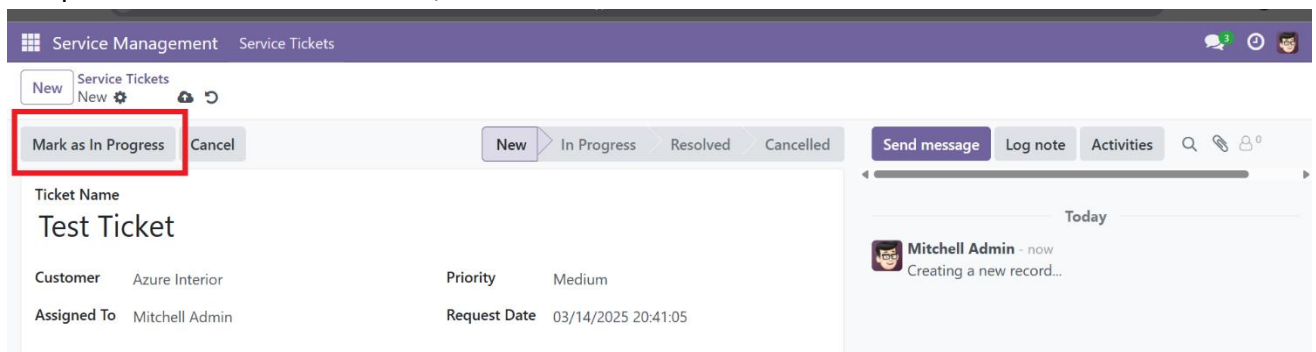
Customer Azure Interior **Priority** Medium

Assigned To Mitchell Admin **Request Date** 03/14/2025 20:41:05

Today
Mitchell Admin - now
Creating a new record...

2) Process and Status Changes

- To update status to IN PROGRESS, click the **MARK AS IN PROGRESS** button.



The screenshot shows the 'Service Management' interface with a 'Service Tickets' tab. The 'Mark as In Progress' button is highlighted with a red box. Below it is a form for updating a ticket.

New **Service Tickets** **New** **Mark as In Progress** **Cancel** **New** **In Progress** **Resolved** **Cancelled** **Send message** **Log note** **Activities**

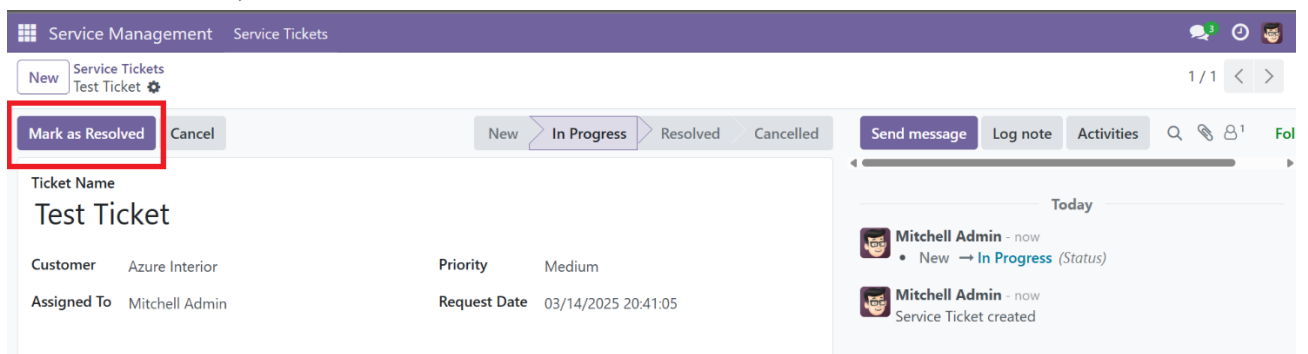
Ticket Name
Test Ticket

Customer Azure Interior **Priority** Medium

Assigned To Mitchell Admin **Request Date** 03/14/2025 20:41:05

Today
Mitchell Admin - now
Creating a new record...

- To resolve a ticket, click **MARK AS RESOLVED** button.



The screenshot shows the 'Service Management' interface with a 'Service Tickets' tab. The 'Mark as Resolved' button is highlighted with a red box. Below it is a form for updating a ticket.

New **Service Tickets** **Test Ticket** **Mark as Resolved** **Cancel** **New** **In Progress** **Resolved** **Cancelled** **Send message** **Log note** **Activities**

Ticket Name
Test Ticket

Customer Azure Interior **Priority** Medium

Assigned To Mitchell Admin **Request Date** 03/14/2025 20:41:05

Today
Mitchell Admin - now
• New → In Progress (Status)
Mitchell Admin - now
Service Ticket created

- Once RESOLVED, it will automatically update the **RESOLVED DATE** field and send an **EMAIL** to the customer stating that the ticket has been resolved.

The screenshot shows the 'Service Management' interface for a ticket named 'Test Ticket'. The ticket is in the 'Resolved' state. The 'Resolved Date' is 03/14/2025 21:08:00. A message from Mitchell Admin is highlighted in red, stating: 'Dear Azure Interior, Your ticket **Test Ticket** has been resolved.'

Ticket Name: Test Ticket

Customer: Azure Interior

Assigned To: Mitchell Admin

Priority: Medium

Request Date: 03/14/2025 20:41:05

Resolved Date: 03/14/2025 21:08:00

Today

Mitchell Admin - now
• In Progress → **Resolved** (Status)

Mitchell Admin - now
Dear Azure Interior,
Your ticket **Test Ticket** has been resolved.

Mitchell Admin - now
• New → **In Progress** (Status)

Mitchell Admin - now
• Cancelled → **New** (Status)

Mitchell Admin - 1 minute ago
• In Progress → **Cancelled** (Status)

- To cancel a ticket, click the **CANCEL** button

The screenshot shows the 'Service Management' interface for a ticket named 'Test Ticket'. The ticket is in the 'In Progress' state. The 'Cancel' button is highlighted in red.

Ticket Name: Test Ticket

Customer: Azure Interior

Assigned To: Mitchell Admin

Priority: Medium

Request Date: 03/14/2025 20:41:05

Today

Mitchell Admin - now
• New → **In Progress** (Status)

Mitchell Admin - now
Service Ticket created

- To process cancelled tickets, click the **RESET TO DRAFT** button

The screenshot shows the 'Service Management' interface for a ticket named 'Test Ticket'. The ticket is in the 'Cancelled' state. The 'Reset to Draft' button is highlighted in red.

Ticket Name: Test Ticket

Customer: Azure Interior

Assigned To: Mitchell Admin

Priority: Medium

Request Date: 03/14/2025 20:41:05

Today

Mitchell Admin - now
• In Progress → **Cancelled** (Status)

Mitchell Admin - 5 minutes ago
• New → **In Progress** (Status)

Mitchell Admin - 5 minutes ago
Service Ticket created

3) Search and Filters

- Filter assigned tickets to current user by clicking **MY TICKETS** in filter section.

The screenshot shows the Service Management interface with the 'Service Tickets' section. The search bar at the top contains 'My Tickets'. Below the search bar, a dropdown menu is open, showing the 'Filters' section. The 'My Tickets' filter is selected and highlighted with a red box. The table below shows a list of tickets with columns: Request Date, Ticket Name, Customer, Assigned To, Priority, and Status. The tickets are filtered by the 'My Tickets' filter.

Request Date	Ticket Name	Customer	Assigned To	Priority	Status
03/11/2025 20:54:12	Email System Issue	Ready Mat	Mitchell Admin	High	In Progress
03/14/2025 20:54:12	Database Access Request	The Jackson Group	Mitchell Admin	Medium	New
03/09/2025 20:54:12	Employee Laptop Upgrade	Azure Interior	Mitchell Admin	High	Cancelled
03/07/2025 20:54:12	Office Wi-Fi Performance	Ready Mat	Mitchell Admin	Low	New
03/14/2025 20:41:05	Test Ticket	Azure Interior	Mitchell Admin	Medium	Resolved
03/14/2025 20:41:05	Test Ticket	Azure Interior	Mitchell Admin	Medium	Resolved

- Filter by **PRIORITY**

The screenshot shows the Service Management interface with the 'Service Tickets' section. The search bar at the top contains 'Low'. Below the search bar, a dropdown menu is open, showing the 'Filters' section. The 'Low' filter is selected and highlighted with a red box. The table below shows a list of tickets with columns: Request Date, Ticket Name, Customer, Assigned To, Priority, and Status. The tickets are filtered by the 'Low' priority.

Request Date	Ticket Name	Customer	Assigned To	Priority	Status
03/12/2025 20:54:12	Printer Malfunction	Deco Addict	Marc Demo	Low	Resolved
03/07/2025 20:54:12	Office Wi-Fi Performance	Ready Mat	Mitchell Admin	Low	New

The screenshot shows the Service Management interface with the 'Service Tickets' section. The search bar at the top contains 'Medium'. Below the search bar, a dropdown menu is open, showing the 'Filters' section. The 'Medium' filter is selected and highlighted with a red box. The table below shows a list of tickets with columns: Request Date, Ticket Name, Customer, Assigned To, Priority, and Status. The tickets are filtered by the 'Medium' priority.

Request Date	Ticket Name	Customer	Assigned To	Priority	Status
03/13/2025 20:54:12	Software Installation Request	Gemini Furniture	Marc Demo	Medium	In Progress
03/14/2025 20:54:12	Database Access Request	The Jackson Group	Mitchell Admin	Medium	New
03/14/2025 20:41:05	Test Ticket	Azure Interior	Mitchell Admin	Medium	Resolved
03/14/2025 20:41:05	Test Ticket	Azure Interior	Mitchell Admin	Medium	Resolved

The screenshot shows the Service Management interface with the 'Service Tickets' section. The search bar at the top contains 'High'. Below the search bar, a dropdown menu is open, showing the 'Filters' section. The 'High' filter is selected and highlighted with a red box. The table below shows a list of tickets with columns: Request Date, Ticket Name, Customer, Assigned To, Priority, and Status. The tickets are filtered by the 'High' priority.

Request Date	Ticket Name	Customer	Assigned To	Priority	Status
03/14/2025 20:54:12	Network Connectivity Issue	Deco Addict	Marc Demo	High	New
03/11/2025 20:54:12	Email System Issue	Ready Mat	Mitchell Admin	High	In Progress
03/09/2025 20:54:12	Employee Laptop Upgrade	Azure Interior	Mitchell Admin	High	Cancelled

- Filter by STATUS

Service Management Service Tickets					
New Service Tickets		New		1-3 / 3	
Request Date	Ticket Name	Customer	Assigned To	Priority	Status
03/14/2025 20:54:12	Network Connectivity Issue	Deco Addict	Marc Demo	High	New
03/14/2025 20:54:12	Database Access Request	The Jackson Group	Mitchell Admin	Medium	New
03/07/2025 20:54:12	Office Wi-Fi Performance	Ready Mat	Mitchell Admin	Low	New

Service Management Service Tickets					
New Service Tickets		In Progress		1-2 / 2	
Request Date	Ticket Name	Customer	Assigned To	Priority	Status
03/13/2025 20:54:12	Software Installation Request	Gemini Furniture	Marc Demo	Medium	In Progress
03/11/2025 20:54:12	Email System Issue	Ready Mat	Mitchell Admin	High	In Progress

Service Management Service Tickets					
New Service Tickets		Resolved		1-3 / 3	
Request Date	Ticket Name	Customer	Assigned To	Priority	Status
03/12/2025 20:54:12	Printer Malfunction	Deco Addict	Marc Demo	Low	Resolved
03/14/2025 20:41:05	Test Ticket	Azure Interior	Mitchell Admin	Medium	Resolved
03/14/2025 20:41:05	Test Ticket	Azure Interior	Mitchell Admin	Medium	Resolved

Service Management Service Tickets					
New Service Tickets		Cancelled		1-1 / 1	
Request Date	Ticket Name	Customer	Assigned To	Priority	Status
03/09/2025 20:54:12	Employee Laptop Upgrade	Azure Interior	Mitchell Admin	High	Cancelled

- Group By CUSTOMER

Service Management Service Tickets					
New Service Tickets		Customer		1-5 / 5	
Request Date	Ticket Name	Customer	Assigned To	Priority	Status
▸ Azure Interior (3)					
▸ Deco Addict (2)					
▸ Gemini Furniture (1)					
▸ Ready Mat (2)					
▸ The Jackson Group (1)					

- Group By **ASSIGNED TO**

Service Management Service Tickets

New Service Tickets Assigned To Search... 1-2 / 2

<input type="checkbox"/>	Request Date	Ticket Name	Customer	Assigned To	Priority	Status
▶		Marc Demo (3)				
▶		Mitchell Admin (6)				

4) Ticket Summary Report

- To generate report, click on the gear button then click **TICKET SUMMARY**. The report will automatically downloaded.

Service Management Service Tickets

New Service Tickets Test Ticket ⚙️

🖨️ Ticket Summary

Duplicate
Delete

Ticket Name
Test Ticket

Customer Azure Interior
Assigned To Mitchell Admin

Priority Medium
Request Date 03/14/2025 20:41:05
Resolved Date 03/14/2025 21:08:00

New In Progress Resolved Cancelled

File C:/Users/reyna/Downloads/Ticket%20Summary%20(9).pdf

Ticket Summary (9).pdf 1 / 1 100%

2025-03-14 14:12 YourCompany 1 / 1

Ticket Summary

Test Ticket

Ticket Description:

Customer: Azure Interior
Assigned To: Mitchell Admin

Request Date: 2025-03-14 12:41:05
Resolved Date: 2025-03-14 13:08:00
Priority: Medium
Status: Resolved

5) Access Rights

- Service User – Can create and update tickets
- Service Manager – Can create, update and delete tickets

Service Management access can be set in Settings -> User -> Other

The screenshot shows the ServiceNow user profile for 'Mitchell Admin'. The 'Access Rights' tab is selected. Under the 'USER TYPE' section, 'Internal User' is selected. Under the 'ADMINISTRATION' section, the 'OTHER' category is highlighted with a red box, showing 'Service Ticket' and 'Service Manager' access.

Settings General Settings Users & Companies Translations Technical

New Users Mitchell Admin ⚙️

Groups 10 Access Rights 191 Record Rules 32

2 / 2 < >

Name
Mitchell Admin

Email Address ?
admin

Related Partner ? YourCompany, Mitchell Admin

Access Rights Preferences Account Security

USER TYPE

User types ? ☒ Internal User
☐ Portal
☐ Public

ADMINISTRATION

Administration Settings

OTHER

Service Ticket Service Manager