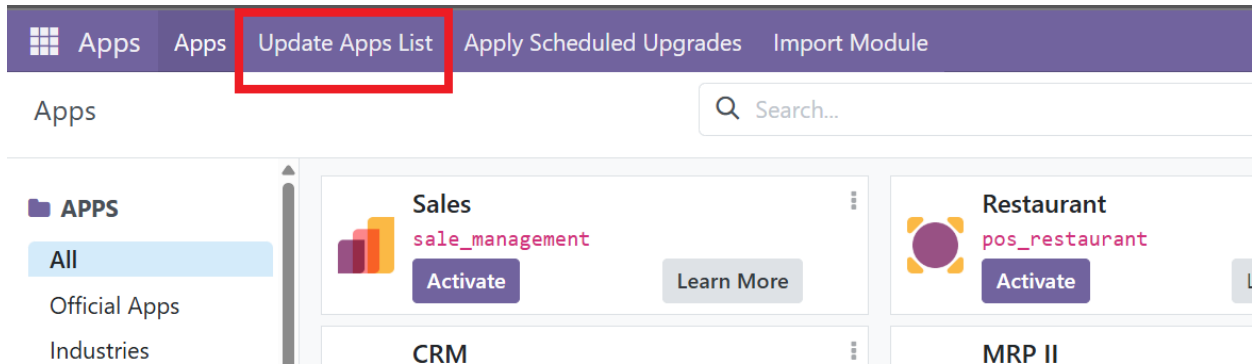
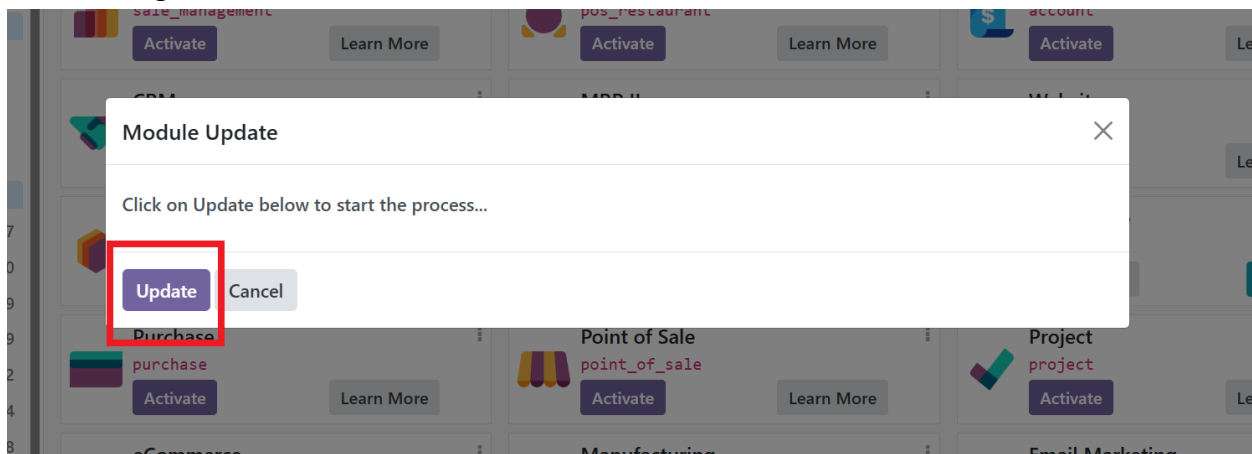


# Installation Guide

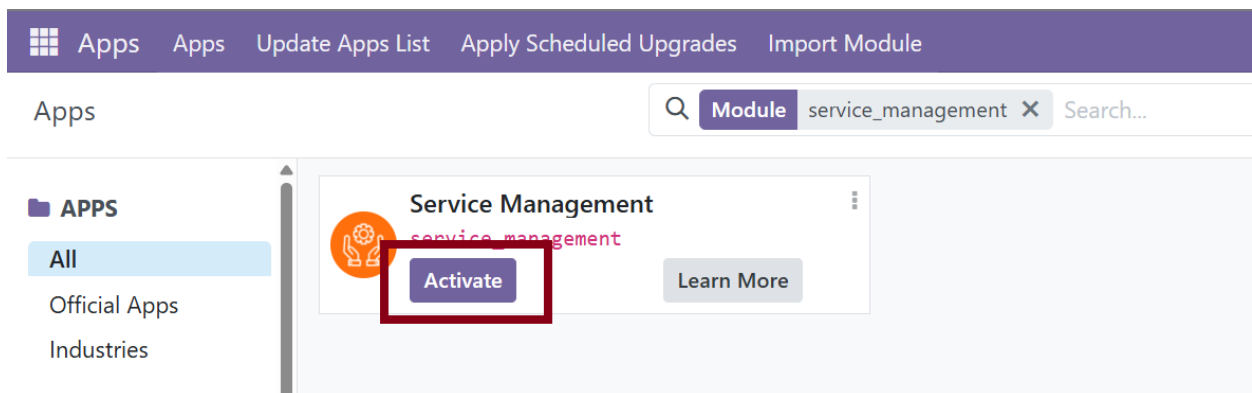
- 1) Copy **service\_management** module to **odoo addons**
- 2) Restart odoo server
- 3) Create **demo database** (NOTE: Make sure to check demo field)
- 4) Login to the database
- 5) Go to **Apps -> Update App List**



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



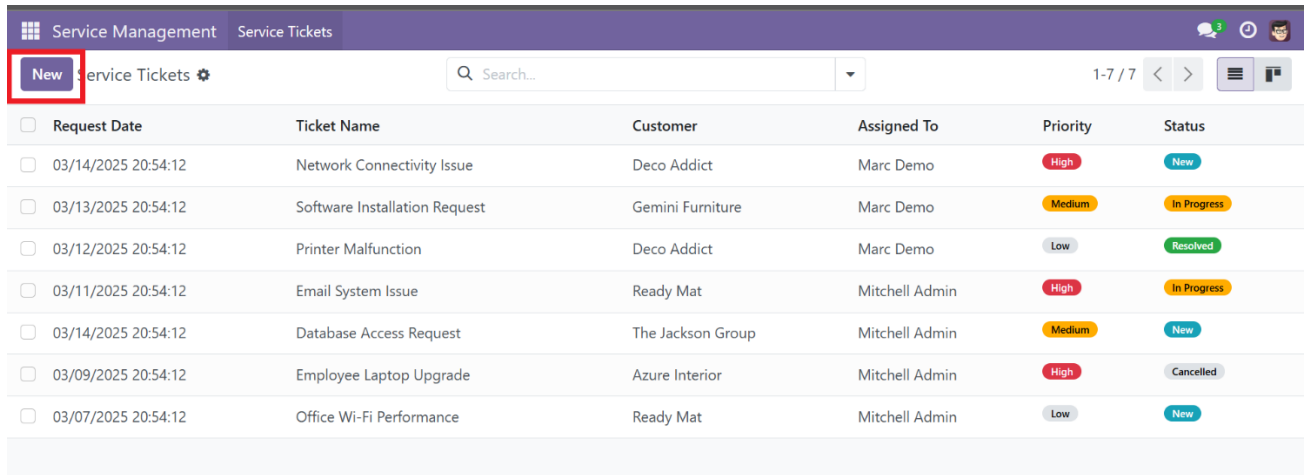
- 7) Search **service\_management** in the app list
- 8) Click **ACTIVATE** to install



# Usage Guide

## 1) Creating **NEW** Tickets

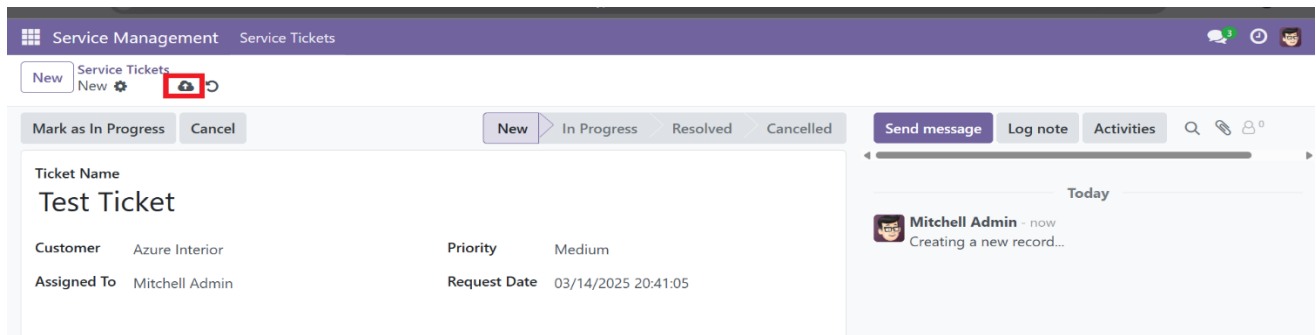
- To create new ticket, click the **CREATE** button in the list view



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

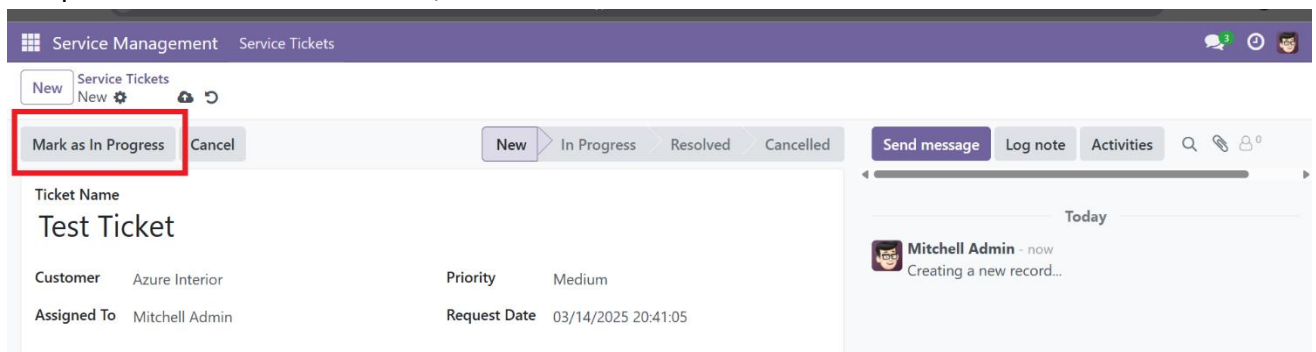
**Customer** Azure Interior **Priority** Medium

**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.

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

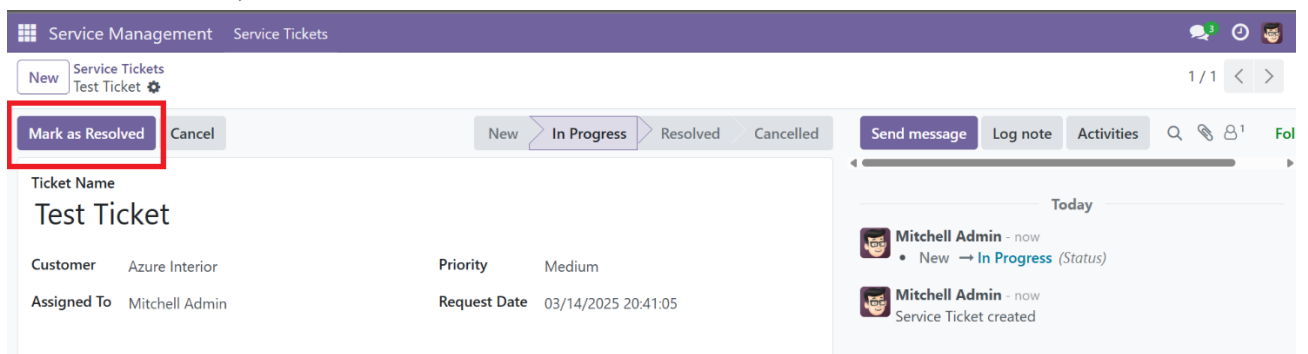
**Ticket Name**  
Test Ticket

**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.

**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. The activity log shows a message from Mitchell Admin: 'Dear Azure Interior, Your ticket **Test Ticket** has been resolved.'

Field	Value
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

- 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. The activity log shows a message from Mitchell Admin: 'Service Ticket created'.

Field	Value
Ticket Name	Test Ticket
Customer	Azure Interior
Assigned To	Mitchell Admin
Priority	Medium
Request Date	03/14/2025 20:41:05

- 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. The activity log shows a message from Mitchell Admin: 'Service Ticket created'.

Field	Value
Ticket Name	Test Ticket
Customer	Azure Interior
Assigned To	Mitchell Admin
Priority	Medium
Request Date	03/14/2025 20:41:05

### 3) Search and Filters

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

Service Management Service Tickets

New Service Tickets

Q My Tickets X Search...

1-6 / 6

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

Service Management Service Tickets

New Service Tickets

Q My Tickets X Search...

1-6 / 6

Filters

My Tickets

Request Date

Resolved Date

Low

Medium

High

New

In Progress

Resolved

Cancelled

Add Custom Filter

Group By

Customer

Assigned To

Add Custom Group

Favorites

Save current search

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**

Service Management Service Tickets

New Service Tickets

Q Low X Search...

1-2 / 2

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

Service Management Service Tickets

New Service Tickets

Q Medium X Search...

1-4 / 4

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

Service Management Service Tickets

New Service Tickets

Q High X Search...

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
03/11/2025 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 Search...		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 Search...		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 Search...		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 Search...		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 Search...		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

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

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