



Getting Started

Quick start guide for ServiceDesk Basic Edition

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2 Introduction to ServiceDesk

Manage Customer Complaints

ServiceDesk is a simple easy to use software specially designed for service industry to manage customer complaints.

Complaint Management



You can manage product or service related customer complaints in ServiceDesk. Complaints can be managed for customers who are in service contract, as well as one time customers. Complaint Management is quiet simple in ServiceDesk.

It covers 3 important stages i.e.

- Registering Complaint
- Assigning it to Service Executive
- Complaint Closure

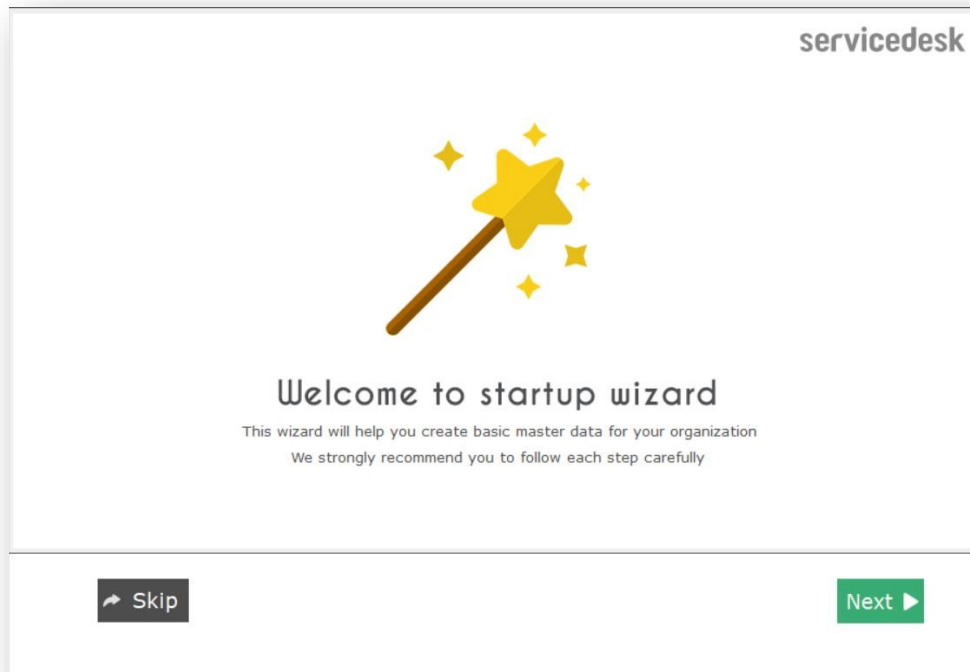
3 Wizard

Introduction

The wizard screen lets you quickly enter basic details required to create masters. This screen will appear only once when you login to the system for first time.

The step by step instructions in the wizard guides you to enter master data like Employee, Product, Complaint Type etc. so that you can immediately start adding Complaints.

Data entered through wizard can be seen in Master screen. You can also further add or modify these details later in the respective masters.



3.a

How to enter data in Wizard

Welcome Screen



The first screen that appears in the wizard is the welcome screen, it is a start-up screen that gives brief introduction about the wizard.

Click **Next** to Continue

Employee



In employee wizard you can enter Technician/Engineer names.

Enter each Employee Name in new line.

You can enter number of Technicians/Engineers as per license purchased.

By default **Login Name** and **Password** would be automatically generated for employee.

Sample Data

Anil Kumar

Adil Shaikh

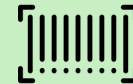
Click on **Next** button to continue



Please note :

Details added in the Employee wizard can be changed or you can add more Employees from the menu option **Master** → **Employee** .

Product



In Product wizard you can enter Product Category for which you are taking complaints.

Default sample categories are given you can modify the list or add your product categories

Click on **Next** button to continue

Sample Data

Computer
Laptop
Server
Printer
Air conditioner
Water cooler



Please note :

Details added in the Product wizard can be changed or you can add more products category from the menu option **Master → Product** .

Complaint Type



In Complaint Type wizard you can enter Complaint Type for Complaints.

Default Complaint Types list is given, you can modify the list or add more Complaint Types.

Click on **Next** button to continue

Sample Data

Does not switch on
Remote not working
Leakage
Paper jam
Noise



Please note :

Details added in the Complaint Type wizard can be changed or you can add more Complaint Types from the menu option **Master → Parameter** .

Finish Screen



This is the final screen in wizard.

After clicking on finish, respective master data will be created.

This data can also be modified from the Master menu option.

Click **Finish** to start entering data in Complaint.

3.b How to edit data entered in wizard

Data entered through wizard i.e. Employee, Product and Complaint Type can be changed in respective master screens.

For example to change Employee details follow the steps given below.

Steps to Edit employee details entered in wizard

1. Go to Menu Option **Master** → **Employee (Users)**
2. Select the employee name in the grid for e.g. Anil Kumar
3. Since we have added only name in the wizard, here you can add further details such as Address, Telephone No and Email Id
4. You can also change the Login Name, Password and Profile by clicking on **Login** tab
5. Click on **Save** on the above toolbar
6. You will receive **Employee Saved** message, which means the changes have been successfully saved
7. Click **OK** on the message
8. You can view the changes by selecting the employee name from the grid for e.g. Anil Kumar



You can also :

Similarly with the above steps you can modify the details of Product and Complaint type.

4 Complaint

You can track customer complaints related to products or services, right from registration (initiation) to closure.

The different stages in complaint management, brings you the insight of complaint status whether it is solved or pending.

Lets understand how to manage these stages in detail

- 4.a How to register complaint**
- 4.b How to assign complaint**
- 4.c How to close complaint**
- 4.d How to see complaint details**
- 4.e Complaint Reports**

4.a How to register complaint

You may receive customer complaints or service requests via email, telephone or other sources. Once you get the complaint you need to register it into the system.

You can capture details such as Customer name, contact details, Product details such as model and serial number, Complaint details such as complaint type, brief description. A unique number is generated for every complaint which can be shared with customers for future communication.

Steps to register complaint

1. Go to Menu Option **Organization** → **Complaint**
2. **Complaint No.** is autogenerated by the system once you save the complaint details.
3. **Complaint Date** by default would be current date. You can change the date if required.
4. Enter Customer details such as **Name, Contact Person, Address, Telephone No., Mobile No. and E-mail**
5. Select the **Product** for which you have received complaint
6. Enter the product **Model** for which you have received the complaint (optional)
7. Enter the **Serial No.** of the product (optional)
8. Select **Complaint Type** from the dropdown list.
9. You can add complaint description in the **Complaint Details** (optional)
10. Click **Save** on the above Toolbar
You will receive the save message "**New Complaint No.1 is generated**"
This indicates that your complaint is saved successfully
11. Click **OK**
The new Complaint will be listed in the above Complaint grid.
Complaint number is auto generated for New Complaint.



Please note :

You can also select the service executive name in **Assigned To** by clicking on **Closure** tab, then the complaint will directly appear in the Closure screen, else it will appear in Assign screen for assigning.



You can also :

If you do not see the desired name in any of the dropdown lists. You can add it by clicking on + button present next to the dropdown list, it will take you to the respective master where you can add more items.

4.b How to assign complaint

After complaint is registered, you can assign it to a service executive.

The Assign screen provides you the pending list of complaints that are yet to be assigned, so that you can quickly allocate it, to service executive.

Assigning complaints, will ensure accountability for every complaint recorded.

Steps to assign complaint

1. Go to Menu Option **Organization** → **Assign**
2. You will see the list of Un Assigned Complaints. Select the complaint which you want to assign.
3. Click on **Assign Complaint** on the above tool bar.
4. Enter **Assign Date** and **Assign To**.
5. Click on **Save**.
6. You will receive **Complaint Assigned** message
7. Click on **OK**.

Now the Complaint is assigned to the service executive, hence it will move to the next stage that is Closure.

4.C How to close complaint

Closure is the last stage in complaint management that enables you to track the status of complaint i.e. solved or pending.

You can capture service closure details such as Closed Date, Closed by Service Executive, Work Done or measures taken, to resolve the issue, Status, pending reason etc.

Tracking status enables you, to identify complaints that are pending or un-solved.

It also helps you to analyse the overall service performance.

Steps to close complaint

1. Go to Menu Option **Organization** → **Close**
2. Here you will see the list of pending Complaints. Select the complaint which you want to Close.
3. Click on **Close Complaint** on the above tool bar.
4. Enter **Closed Notes**.
5. Click on **Save**. You will receive a **Complaint Closed** message
6. Click on **OK**.

After complaint is closed it will not appear in the Closure screen.

In Reports you can view the closure details.

4.d How to view complaint details

You can view complaint details by entering the complaint number.

Steps to view complaint details by entering complaint no.

1. Go to Menu Option **Organization** → **Complaint**
2. Enter Complaint No. in the **Complaint No.** field
For e.g. Complaint No. 1
3. Press **Enter**.

Following details will be displayed

Customer details like Customer Name, Contact Person, Address, Telephone No., Mobile No., Email Id

Complaint details like Complaint Type and Complaint Details

Product details like Product, Model, Serial No.,

Closed Details like Closed Date, Closed By and Closed Notes.



You can also :

Alternatively, you can also select complaint from the grid to view its details.

4.e Complaint Reports

All data entered into the system, can be viewed in report, through a smart reporting utility that enables you to sort, filter and aggregate the data. The data in the reports can be exported to excel for further visualisation and analysis.

Complaint Reports List

Complaint List : You will get the list of all the complaints which are pending, assigned and closed.

Pending : You will get the list of pending complaints which are yet to be assigned or assigned but not closed.

Closed : You will get the list of complaints which are closed.

Steps to generate complaint reports

1. Go to Menu Option **Organization** → **Reports** → **Report**
2. In Report List Select **Complaint** to view Complaint related reports
3. Select **List**.
By default current month data will be populated in the right side grid
You can filter the report datewise by clicking on **Date Filter** → **Custom** on the above toolbar.
4. By clicking on **Export to Excel** on the above tool bar data will be exported into Excel.

You can also use **Smart Report** option to Filter and Aggregate the data.

Similarly you can generate other reports.



Please note :

Reports provided in **Organization** --> **Reports** --> **Report** are for all service executives. However, if you wish to view data for specific executive, you can filter the data using **smart report**.

Other software's

salestracker
Sales CRM

TimeTracker
Project Timesheet

xplore
Digital catalog software

spinso

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