

spinso



servicedesk

Getting Started with ServiceDesk

Quick start guide for ServiceDesk : Service CRM

Manage service contracts & complaints



Getting Started

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Introduction

Easily manage service contract and complaints

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

This can be used by manufacturer, retailers or service provider to systematically manage their data electronically and eliminate paperwork.



Service Contract

Service contracts can be in various forms like warranty from manufactures or Annual Maintenance Contract (AMC) signed with customer. Service provider can keep all this information in single place along with customer detail, warranty/AMC detail and period

ServiceDesk enables you to identify customers within Warranty, AMC or other contracts.

Also track duration of contract and stay informed about the contracts that is active, expired or due for renewal.

Contract Management in ServiceDesk enables you to

- Create Contract
- Renew contract

Complaint Management

Reduce response time and increase customer satisfaction by tracking every single complaint right from registration, assignment to closure in ServiceDesk so it is never left unattended. The different stages of complaint gives you the insight on status of complaint whether it is solved or pending

It covers 3 important stages i.e.

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





Installation

ServiceDesk can be installed on Single PC and multiple pc.

Single PC

In case of single Pc the data is Locally stored

Multi Pc

In case of multi pc Data is stored on central Pc/Server or cloud

You can use the application in LAN, private cloud, public cloud



Prerequisite

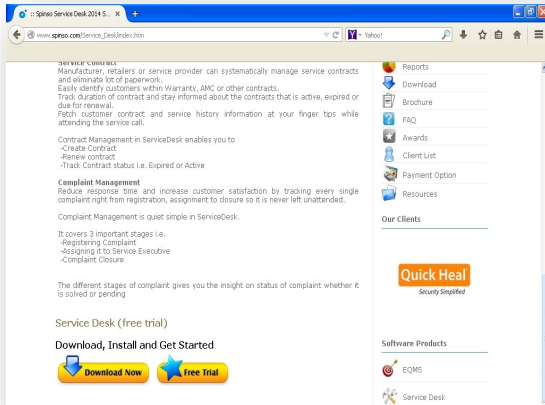
Operating system Windows Xp, Windows 7, Windows 8 or Windows 8.1

Dot net 2.0 *free runtime from Microsoft is available on our website*

Your data on
your pc/laptop

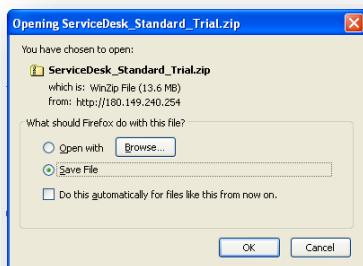


To download and install visit
Spinso.com or **Spinso.in**



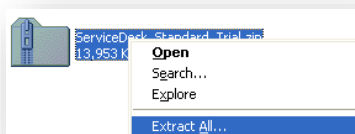
1

Click on **Download Now** button



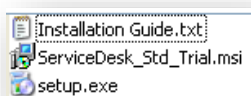
2

Save to your desktop



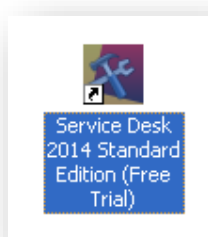
3

Extract Zip file



4

Run **Setup.exe** to install
Follow installation instruction

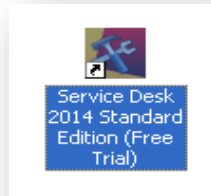


5

ServiceDesk Icon would appear on the
desktop

4

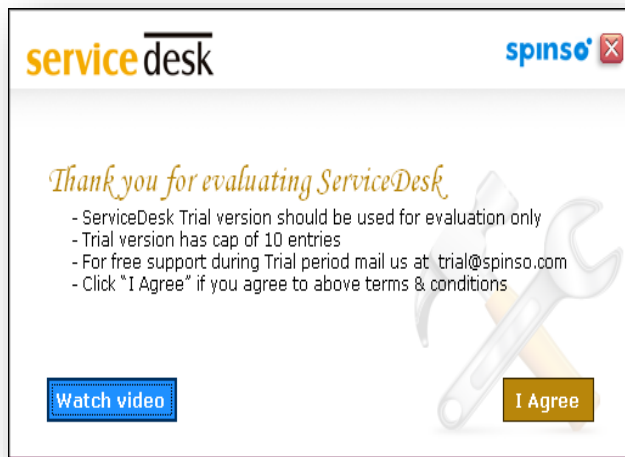
Login



After you install ServiceDesk you can click on the ServiceDesk icon on your desktop to launch the application

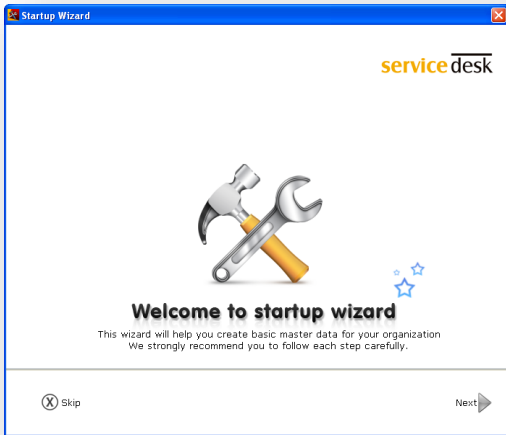


ServiceDesk login screen would open
Click on **Login**



Click on **I Agree** to continue

5 Wizard



Once you login to ServiceDesk for the first time a welcome wizard would help you create master entry so that you can start using ServiceDesk

You can modify this master later from their respective master screens

Click **Next** to continue

You can enter your employee name here
Multiple employee names can be entered here using enter key

Sample Data
Sandra Peterson
David Thomsan

Click **Next** to continue

You can enter your customer names who are giving regular enquiries

So you need not have to enter the customer name every time while entering Contract/Complaint, you can select it from master data.

Multiple customer names can be entered here using enter key

Sample Data
S M Enterprises
Sunil Malhotra
TDL Ltd.

Click **Next** to continue

Product Details

Please enter Product Name
Enter each Product in a new line

Computer
Laptop
Server
Printer
Air conditioner
Water cooler
Photo copier

Product Introduction

You can define the product here followed by the rate.
Each product should be added in a new line.

ⓧ Skip Previous Next

You can enter your product name here
Multiple product details can be entered here using enter key

Sample Data

Computer
Laptop
Server

Click **Next** to continue

Brand Details

Please enter Brand Name
Enter each Brand in a new line

Hewlett Packard
Samsung
Dell
General Electric
Cisco
Nokia
Sony
Siemens
Caterpillar
Vishay
Bosch
Sanyo

Brand Introduction

You can define the Brand.
Each brand should be added in a new line.

ⓧ Skip Previous Next

You can enter your brand name here
Multiple brand details can be entered here using enter key

Sample Data

Samsung
Bosch
Nokia

Click **Next** to continue

Region Details

Please enter Region Name
Enter each Region in a new line

Mumbai
Delhi
USA

Region Introduction

Define the region for your customer & complaints.
You can add each region in a new line.

ⓧ Skip Previous Next

You can enter region name here
Multiple regions can be entered here using enter key

Sample Data

Mumbai
Delhi
USA

Click **Next** to continue

You can enter complaint type here
Multiple complaint types can be entered here using enter key

Sample Data

Does not switch on
Remote not working
Leakage

Click **Next** to continue

You can enter contract type here
Multiple contract types can be entered here using enter key

Sample Data

Warranty
AMC
Labour only

Click **Next** to continue

When you click finish respective master data will be created
Click **Finish**

6

Contract

Manufacturer, retailers or service provider can systematically manage service contracts and eliminate lot of paperwork. Easily identify customers within Warranty, AMC or other contracts. Track duration of contract and stay informed about the contracts that are active, expired or due for renewal. Fetch customer contract and service history information at your finger tips while attending the service call.

Service Contract covers 2 important stages i.e.

6.a Create Contract

6.b Renew Contract

6.a Create Contract

1

Open **Service Contract – Contract** menu



2

By default it would be in the **NEW** mode



3

Enter contract details

Contract No	New	Date	14/10/14	Product*	Printer	+	R
Customer Name*	Global Services			Brand	Hewlett Packard	+	R
Name	Global Services						
Contact Person	Mr.Rakesh Jain						
Address	Peninsula Business Park, Tower C (7th Floor), Senapati Bapat Marg, Lower Parel,						
Telephone No.	+91-22-66089012						
Mobile No(s).							
E-Mail	rakesh.jain@globalservices.com						
Region	Mumbai			Contract Type	AMC	+	R
				Contract Period	14/10/14	To	13/10/15
				Amount	1000		
				Remarks			

4

To save the details click on **Save** Button

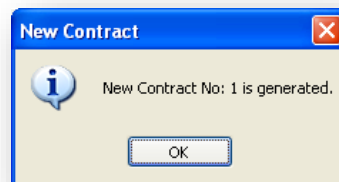


5

You would see the following message New Contract No:1 is generated. This indicates your data is saved and new number is generated for this contract that is 1.

Click on OK

For the next contract the number 2 will be generated



6

You would see contract no 1 added

Contract No	Date	Customer Name	Name	Contact Person	Address
1	14/10/14	Global Services	Global Services	Mr.Rakesh Jain	Peninsula Business



You can also

- Modify Contract details
- Delete Contract
- Search/Filter Contract list

6.b Renew Contract

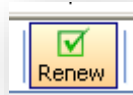
1

Open **Service Contract – Contract** menu



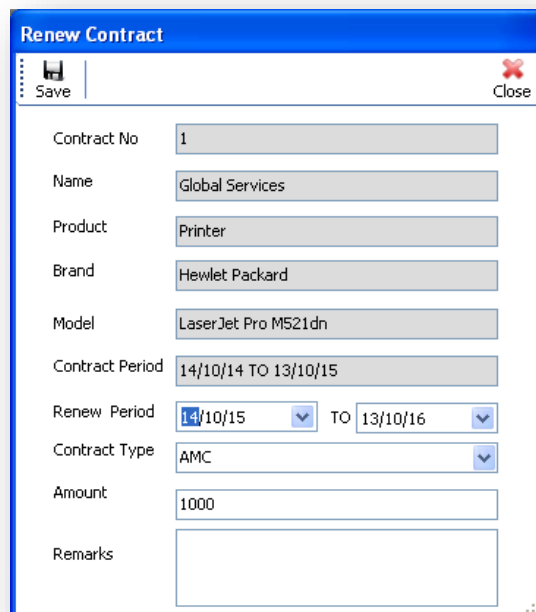
2

Select the contract to renew from the list
Click on **Renew** to renew the existing contract



3

Renewal Period, Contract Type, Amount and Remarks can be changed as per your requirement. Click on **Save** to renew the contract

A screenshot of a 'Renew Contract' dialog box. The dialog box has a title bar with 'Renew Contract' and a 'Close' button. It contains several input fields and a 'Save' button. The fields are: Contract No (1), Name (Global Services), Product (Printer), Brand (Hewlet Packard), Model (LaserJet Pro M521dn), Contract Period (14/10/14 TO 13/10/15), Renew Period (14/10/15 TO 13/10/16), Contract Type (AMC), Amount (1000), and Remarks (empty text area).

7

Complaint Management

Reduce response time and increase customer satisfaction by tracking every single complaint right from registration, assignment to closure so it is never left unattended. Complaint Management is quite simple in ServiceDesk.

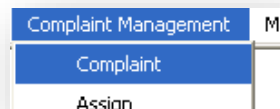
It covers 3 important stages i.e.

- 7.a Entering Complaint
- 7.b Assigning Complaint
- 7.c Closing Complaint

7.a Entering Complaint

1

Open **Complaint Management – Complaint** Menu



2

By default it would be in the **NEW** mode



3

Enter Contract Number and press **Enter Key**

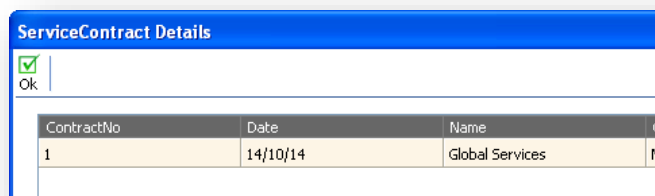


OR

Click on the **Browse** button to select the contract



Select contract number to select the contract and click on **OK**



4

Details of contract would be displayed

Contract No.	1	...	Product	Printer	+	R	
Customer Name*	Global Services	+	R	Brand	Hewlett Packard	+	R
Contact Person	Mr. Rakesh Jain			Model	LaserJet ProM521dn		
Address	Peninsula Business Park, Tower C (7th Floor), Senapati Bapat Marg, Lower Parel,			Serial No.	A8P79A A8P80A ENW		
Telephone No.	+91-22-66089012			Contract Type	AMC		
Mobile No(s).				Contract Period	14/10/14 To 13/10/15		
E-Mail	rakesh.jain@globalservices.com			Amount	1000		
Region	Mumbai	+	R	Assigned Details			
				Closed Details			

5

Select Complaint Type & enter more details about Complaint in the Complaint Details

Region	Mumbai	+	R
Complaint Type*	Paper jam	+	R
Complaint Details	check noise problem		

6

Click on **Save** to save complaint details



7

You would see the following message New Complaint No.1 is generated. This indicates your data is saved and new number is generated for this complaint that is 1. Click on OK



8

You would see complaint no 1 added

Complaint No	Date	Contract No.	Name	Contact Person	Address
1	14/10/14	1	Global Services	Mr.Rakesh Jain	Peninsula Busine.



You can also do the following

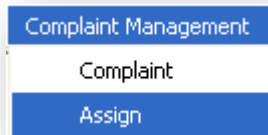
- Modify Complaint details
- Delete Complaint
- Search/Filter Complaint list

7.b Assigning Complaint

In the assign screen we get pending complaints which are yet to be assigned. We can assign the complaints from menu Complaint Management – Assign

1

Open **Complaint Management – Assign**



2

Double click on Complaint to assign it

Un-Assigned Complaints

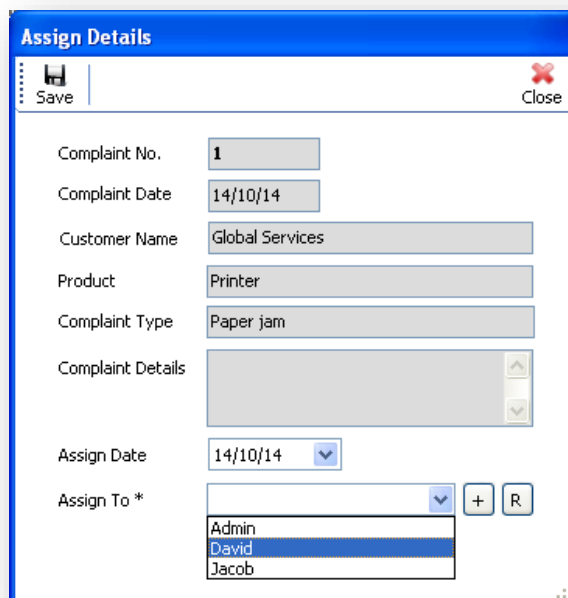
Complaint No.	Complaint Date	Contract No	Name	Contact Person
1	14/10/14	1	Global Services	Mr.Rakesh Jain

Or Select the Complaint and click on **AssignComplaints** button



3

Select Technician/Engineer name in **Assign To** and click on **Save**

A screenshot of a web form titled 'Assign Details'. The form has a blue header bar with 'Assign Details' and a 'Close' button. Below the header, there are several input fields: 'Complaint No.' (text box with '1'), 'Complaint Date' (text box with '14/10/14'), 'Customer Name' (text box with 'Global Services'), 'Product' (text box with 'Printer'), 'Complaint Type' (text box with 'Paper jam'), and 'Complaint Details' (a large text area). Below these fields, there is an 'Assign Date' dropdown menu with '14/10/14' selected. At the bottom, there is an 'Assign To *' dropdown menu with a list of names: 'Admin', 'David', and 'Jacob'. To the right of the dropdown menu are two buttons: a '+' button and an 'R' button. There is also a 'Save' button in the top left corner of the form.

Note

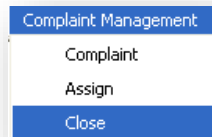
Once you assign the complaint, the complaint would be removed from the Unassigned Complaints.
This complaint would appear in Closure screen & reports.

7.c Closing Complaint

After assigning the complaint, it will be moved to the Close screen for Closure. Here we can get the pending complaint list which are yet to be closed.

1

Open **Complaint Management – Close**



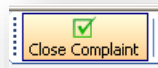
2

Double click on Complaint to Close it

Pending complaints

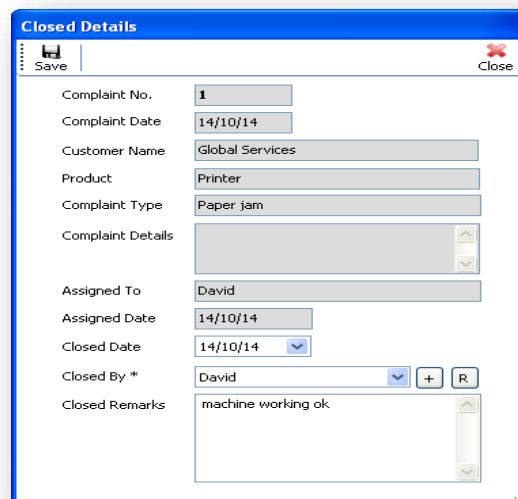
Complaint No.	Complaint Date	Name	Product	Complaint Type
1	14/10/14	Global Services	Printer	Paper jam

Or Select the Complaint and click on **Close Complaint** button



3

Select the Technician/Engineer name who has closed the call and enter closed remarks with action taken. Click on Save.

A screenshot of a "Closed Details" form. The form has a blue header with "Save" and "Close" buttons. It contains several fields: "Complaint No." (1), "Complaint Date" (14/10/14), "Customer Name" (Global Services), "Product" (Printer), "Complaint Type" (Paper jam), "Complaint Details" (empty text area), "Assigned To" (David), "Assigned Date" (14/10/14), "Closed Date" (14/10/14), "Closed By *" (David), and "Closed Remarks" (machine working ok). There are also "+" and "R" buttons next to the "Closed By" field.

Note

Once you Close the complaint, the complaint would be removed from the Pending Complaints. This complaint would appear in reports.

8

Reports

Reports gives you detailed register of Contracts and Complaints.

The data in report can be exported to excel, for further visualization and analysis
You can use this data to build custom reports, pivots, mail merge etc

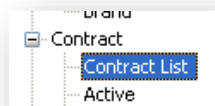
1

Click on **Organization – Reports**



2

Select the report for report list **Contract List**



3

Data of selected report will be displayed in the list

Contract No	Contract Date	Customer Name	Contact Person	Address	Telephone	Mobile No	Email
3	09/10/14	Triko R&D Ltd	Lawrence Upton	East Wood HOu...	44 (0)208 2178...		lawrence52@c
2	09/10/14	S.M.Enterprises	Mr. Suneja	203 Raheja Co...	011- 22341531	9310487232	dines.suneja@

4

Click on **Export to Excel** if you wish to export the data



Note

Once you update the closure status the enquiry would be removed from the closure list.
Also the enquiry would not appear in follow-up as follow up action is needed for the enquiry.

Other software's

EQMS

Sales CRM

Manage your enquiry in 3 easy steps
Enquiry/Lead—Follow up & closure

TimeTracker

Project Timesheet

Manage employee timesheet, project cost,
expense holiday & leave tracking

Organizer

No 1 Software for Air-Conditioner Dealer

Manage inventory, billing, payment, card &
complaints

spinso

Spectrum Info Solutions

26 , Sylvester House - B,
D'Souza Wadi,
Thane (W) - 400 604.
Maharashtra, INDIA