spinso

Standard Edition

servicedesk
Manage service Contract & Complaints

Getting Started
Quick start guide for ServiceDesk Standard Edition

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Getting Started

2   **Introduction to ServiceDesk**

Manage Service Contracts and Complaints

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

Contract Management

Service contracts can be in various forms like warranty from manufacturer 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 are active, expired or due for renewal.

Contract Management in ServiceDesk enables you to

- Create Contract
- Renew contract

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, Customer, Product, Brand, Complaint Type, Contract Type etc. so that you can immediately start adding Complaints and Contracts.

Data entered through wizard can be seen in Master screen. You can also further add or modify these details later in the respective masters.
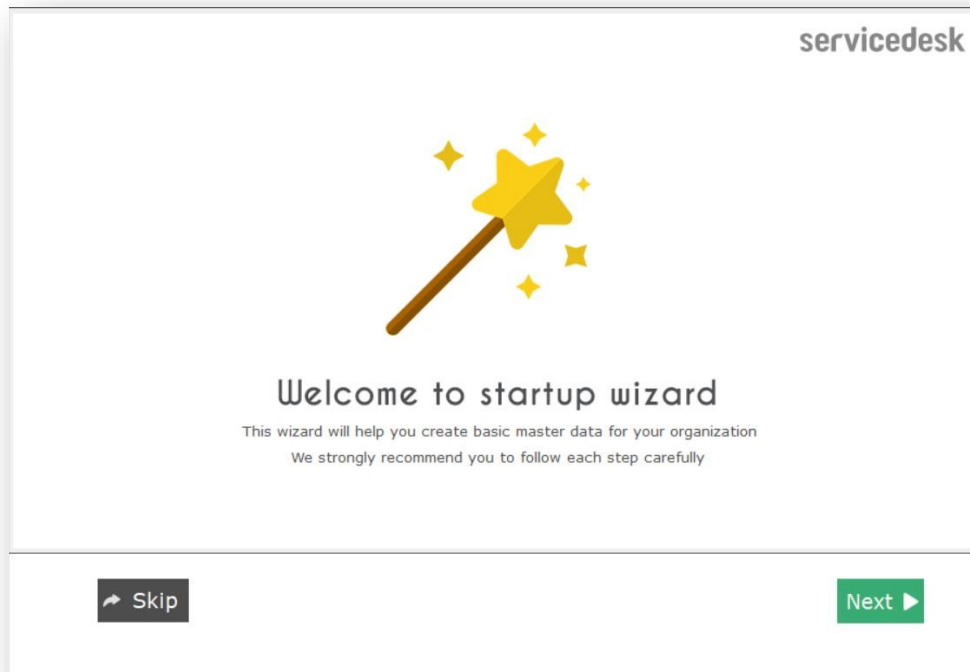
3.a How to enter data in Wizard

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.

Click on **Next** button to continue

Sample Data

John Smith

Rita Singh

Please note :

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

Customer

In Customer wizard you can enter Customer Names.

Enter each Customer Name in new line.

You can enter as many customer names as you want.

Click on **Next** button to continue

Please note :

You can add other details like Contact person, Address, Telephone No., Mobile No., E-mail Id, Website or you can add more Customers from the menu option **Master → Customer** .

Product

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

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

Click on **Next** button to continue

Please note :

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

Brand

In Brand wizard you can enter Brand Names for product entered.

Default sample brand list is given you can modify the list or add your brands.

Click on **Next** button to continue

Sample Data

Hewlet Packard

Samsung

Dell

General Electrics

Cisco

Please note :

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

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** .

Contract Type

In Contract Type wizard you can enter Contract Type for Service Contracts.

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

Click on **Next** button to continue

Please note :

Details added in the Contract Type wizard can be changed or you can add more Contract 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 & Contract.

3.b How to edit data entered in wizard

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

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

Steps to Edit customer details entered in wizard

1. Go to Menu Option **Master → Customer**

2. Select the customer name in the grid for e.g. Prime Solutions Ltd

3. Since we have added only name in the wizard, here you can add further details such as Contact Person, Address, Telephone No, Mobile No, Email Id, Website

4. Click on **Save** on the above toolbar

5. You will receive **Customer Saved** message, which means the changes have been successfully saved

6. Click **OK** on the message

7. You can view the changes by selecting the customer name from the grid for e.g. Prime Solutions Ltd

You can also :

Similarly with the above steps you can modify the details of Employee, Product, Brand, Complaint and Contract 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 brand, model, 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**

     🔗 Or you *can also Select the customer details from customer master by clicking on link customer icon*

5.   Select the **Product** for which you have received complaint

6.   Select the product **Brand** for which you have received the complaint (optional)

7.   Enter the product **Model** for which you have received the complaint (optional)

8.   Enter the **Serial No.** of the product (optional)

9.   Select **Complaint Type** from the dropdown list.

10. You can add complaint description in the **Complaint Details** (optional)

11. Click **Save** on the above Toolbar

12. You will receive the save message "**New Complaint No.1 is generated**"

     This indicates that your complaint is saved successfully

13. Click **OK**

     The new Complaint will be listed in the above Complaint grid.

Complaint number is auto generated for New Complaint.

Please note :

If you select the service executive name in **Assigned To** in the **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 Date** and **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, Brand, 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, group, filter and aggregate the data. The data in the reports can be exported to excel for further visualisation and analysis.

Complaint Reports List

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 by date such as weekly, monthly, yearly etc. by clicking on **Date Filter** button 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, Group 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**.

5 Contract

Various types of service contracts such as AMC, warranty, labour or any support contract can be managed in ServiceDesk.

Tracking service contracts helps you to organize & simplify, the contract management process. Get insight of contracts due for active, renewal and expired.

Learn more about

5.a   How to generate contract

5.b   How to register complaint for contract

5.c   How to see contract reports

5.a How to generate contract

In contract, you can capture details like customer name, address, telephone, products, contract period, contract amount for non warranty contracts

Steps to generate contract

1. Go to Menu Option **Organization → Contract**
2. **Contract No.** is autogenerated by the system once you save the contract details.
3. **Contract Date** by default would be current date. You can change the date if required.
4. Select **Customer Name** from the dropdown list.

   After selecting the customer the other details such as **Contact Person, Address, Telephone No., Mobile No. and Email** will automatically appear as defined in the master.
5. Select **Contract Type** from the dropdown list.
6. Select **Contract Period** depending on the duration of the contract.
7. You can also enter **Amount** of the Contract
8. To add Products in Contract, Click on **Product** Tab, present besides the General tab

   Steps to add product

   - Click on **+** icon.
   - Click on **Add Product**
   - Select the **Product**
   - Select the **Brand**
   - Enter the **Model**
   - Enter the **Serial No.**
   - You can enter more details about the product in the **Notes**
   - Save the product details

   You can follow the above steps to add multiple products
9. Click **Save** on above tool bar.
10. You will receive the save message "**New Contract No.1 is generated**".

    This indicates that your contract is saved successfully
11. Click **OK**
12. The new Contract will be listed in the above Contract grid.

    Contract number is auto generated for New Contract.

Please note :

You can renew contract by clicking on **More** in the above tool bar and take the print by clicking on **Print**

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.

5.b How to register complaint for contract

To register Complaints for the customer who is in Service Contract, select the Contract No. All the related details such as Customer Name, Contact Person, Address, Telephone No, Mobile No., Email Id, Product, Brand, Model, Serial No., Contract Type, Contract Period and the amount will be automatically picked up from the respective contract.

Steps to register complaint for contract

1. Go to Menu Option **Organization → Complaint**

2. Click on the button besides the **Contract No**. 🔗

    You will see the Customer list.

3. Select the **Customer** from the list. Products for selected customer will be listed below.

4. Select the **Product** for which you wish to register Complaint.

5. Click on **OK**

    Once you select Customer and Product you would see other details like **Customer Name, Contact Person, Address, Telephone No., Mobile No., Email Id, Product, Brand, Model and Serial No.** will be shown as per the contract.   Also you can see contract type and expiry date beside the icon. 🔗

6. Select **Complaint Type**.

7. You can add complaint description in the **Complaint Details** (optional)

8. Click on **Save** on above tool bar.

9. You will receive the save message "**New Complaint No.2 is generated**".

    This indicates that your complaint is saved successfully.

10. Click **OK**.

11. The new Complaint will be listed in the above Complaint grid.

- **To assign complaint please refer point 4.b**
- **To close complaint please refer point 4.c**

5.c   Contract Reports

View contract related reports that gives you the overview of overall contracts, expired, upcoming renewals and so forth.

Contract Reports List

List : You will get the list of all the Contracts which are active or expired.

Active : You will get the list of active contracts which are not expired.

Expires : You will get the list of expired or expiring contracts for given period.

Contract Products : You will get the list of products which are in contract.

Steps to generate contract list reports

1. Go to Menu Option **Organization** → **Reports** → **Report**
2. In Report List Select **Contract** to view Contract related reports
3. Select **List**.
   By default current month data will be populated in the right side grid
   You can filter the report by date such as weekly, monthly, yearly etc. by clicking on **Date Filter** button present 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, Group and Aggregate the data.

Similarly you can generate other reports.

Please note :

The reporting options like Export to Excel, Filter & Smart Reports is explained in detail in the Reporting Help File.

Other software's

salestracker
Sales CRM

TimeTracker
Project Timesheet

Xplore
Digital catalog software

spinso

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