

HVAC Service crm

ORGANiZER

Installation Guide



Installation Guide

an Introduction to Organizer
Installation options

spinfo.com/Organizer



Installation Guide

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Organizer Service CRM is a software product specially designed for Service Industry. This software is useful for maintaining stock, bills, payment, complaints, AMC details, service calls etc.



No. 1 Software for Air conditioner dealer to manage sales and service business

This is an installation guide for Organizer software.

This will help you setup Organizer software on single pc, multi-pc connected on LAN, on your VPN, private cloud or public cloud.

Operating systems supported



Organizer is a windows application hence it would by default be installed on windows pc or laptop



For MAC user you would need 3rd party tool such as parallel which supports windows application on MAC



If you have any issues/queries during download or installation of Organizer kindly contact our helpdesk for free support at
support@spinso.com
+91.22.25826330
+91.22.25826331



Free Trial

Organizer is available for free trial, so you can download and install software without registration or sharing credit card details

For free support during trial period mail us at trial@spinso.com

All features are enabled in during trial edition with entry restriction

Download install and you are good to go

Applicable for Editions: My, Basic, Standard, Professional & Premium

No Registration
No Personal Details
No Credit Card

A step by step guide on how to download and install Organizer is available on our official website spinso.com/Organizer

Please note *default login details for trial use*

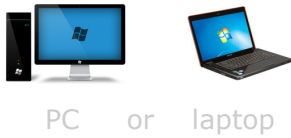
Login Id : admin

Password : demo

You can change password if you wish

Applicable for Editions: My, Basic, Standard & Professional

all spinso products comes with free trial
so Try before you Buy

Accessing and Installing Organizer on various networks**a. Single PC or laptop**

- ✓ Data and application is locally stored
- ✓ you don't need internet to access the data

b. Multi PC connected on LAN

- ✓ Data and application is locally stored
- ✓ you don't need internet to access the data

c. VPN— virtual private network

- ✓ Data and application is locally stored
- ✓ You would need internet to access your VPN

d. Private Cloud

- ✓ Data is stored on your server, you manage the data
- ✓ Application is installed on client pc/laptop
- ✓ You would need internet to access your Private cloud
- ✓ Supports anywhere access

e. Public Cloud

- ✓ Data is stored on spinfo server
- ✓ Application is installed on client pc/laptop
- ✓ You would need internet to access spinfo cloud server
- ✓ Supports anywhere access

The only HVAC Software that comes with option to store data on your server or go cloud

a. Single PC



PC

or

laptop

You can install Organizer on single pc or laptop, where the data and application would be installed on same pc and multi user can access the application via their respective login ID

Please note

- ✓ *Data and application is locally stored*
- ✓ *you don't need internet to access the data*

Prerequisite

Operating system Windows Xp or later (Windows 7 recommended)

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

Crystal report *free runtime for reports available on our website*

Applicable for Editions: My, Basic, Standard, Professional, Premium & Enterprise

Your data on
your pc/laptop



You can also install Organizer on multiple pc connected on LAN, in this case you would need to identify one pc or server as "Server PC" where data would be stored and other client(s) pc would connect to the "Server PC" to access and store the data

Here the data is centrally stored on your server pc

Please note

- ✓ *Data and application is locally stored*
- ✓ *you don't need internet to access the data*

For Basic, Standard & professional Edition

- ✓ *you need to share the folder on server pc and give full rights (read & write) so that other client pc can access the data*
- ✓ *"Server PC" could be any pc, laptop or server with windows operating system and would always be connected to network (LAN) as the data would be stored on this pc/server*

For Premium & Enterprise Edition

- ✓ *In case of premium and enterprise edition you need not share the folder as it works on IP (more secured)*

Prerequisite for Basic, Standard & professional edition

Operating system Windows Xp or later (Windows 7 recommended)
Computers connected on LAN
Shared folder with full rights
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Prerequisite for Premium & Enterprise edition

Server : Windows 2003 or later
Clients : windows 7 or later
SQL Server (License/Free Edition)
Public or Static IP
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Applicable for Editions: Basic, Standard, Professional, Premium & Enterprise

Your data on
your server



You can also install Organizer on your VPN. The installation step would be same as **Multi PC on LAN**. The only difference here would be user would connect to your VPN via Internet and would access Organizer.

Please note

- ✓ *Data and application is locally stored*
- ✓ *You would need internet to access your VPN*

Prerequisite for Basic, Standard & professional edition

Operating system Windows Xp or later (Windows 7 recommended)
Computers connected on LAN
Shared folder with full rights
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Prerequisite for Premium & Enterprise edition

Server : Windows 2003 or later
Clients : windows 7 or later
SQL Server (License/Free Edition)
Public or Static IP
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Applicable for Editions: Basic, Standard, Professional, Premium & Enterprise

Your data on your server



You can also install Organizer on your private cloud, if you wish to give access to your employee/team, who are not part of your local network. Organizer users would access the application and connect to your server to access the data

Please note

- ✓ *Data is stored on your server, you manage the data*
- ✓ *Application is installed on client pc/laptop*
- ✓ *You would need internet to access your Private cloud*

Prerequisite

Server : Windows 2003 or later

Clients : windows 7 or later

SQL Server (License/Free Edition)

Public or Static IP

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

Crystal report *free runtime for reports available on our website*

Applicable for Editions: Premium & Enterprise

Your data on
your server



You can also install Organizer on Spinfo cloud, if you wish to give access to your employee/team, who are not part of your local network. Organizer users would access the application and connect to spinfo server to access the data. This is useful if you do not wish to manage server

Please note

- ✓ *Data is stored on spinfo server*
- ✓ *Application is installed on client pc/laptop*
- ✓ *You would need internet to access spinfo cloud server*

Prerequisite

Clients : windows 7 or later

Internet access

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

Crystal report *free runtime for reports available on our website*

Applicable for Editions: Standard, Professional, Premium & Enterprise

Installation Steps

You can find the installation steps for trial use for the following edition

Basic

Single pc : http://www.spinso.com/organizer/basic/organizer_basic_free_Trial.htm

Multi pc on LAN: contact spinso

Standard

Single pc : http://www.spinso.com/organizer/standard/organizer_standard_free_Trial.htm

Multi pc on LAN: contact spinso

Professional

Single pc : http://www.spinso.com/organizer/Organizer_Free_Trial.htm

Multi pc on LAN: http://www.spinso.com/organizer/organizer_LAN_installation.htm

Premium

Premium edition is not available for trial use, we recommend you to try Professional edition.

Enterprise

Enterprise edition is not available for trial use, we recommend you to try Professional edition.



Registration

Registration is applicable for users who have made the payment and wish to activate the product.

After the product license is activated you can either continue with the trial data or start fresh

Organizer registration steps

- Fill registration details
- Product activation

Registration & activation process happens only once, you can do the registration and activation from any pc or server

Once registered and activated it would automatically update on all the client



Uninstall/Reinstall

Uninstall

If you have installed Organizer for trial use you can uninstall the application using following steps

On Server PC

Start - control panel - programs - uninstall a program
Uninstall Organizer server
Uninstall Organizer client component (if it is installed)

On Client PC

Start - control panel - programs - uninstall a program
Uninstall Organizer client component

Reinstall

If you have registered and activated the product and if you wish to uninstall
Please follow the steps

On Server PC

- If you wish to uninstall the Organizer server for any reason like Server Shift, Format server then please follow the process

- Surrender key
- Take the backup
- Format the server (if required)
- Reinstall Organizer (Setup.exe)
- Restore backup
- Enter the surrender key
- And you are good to use Organizer

On Client PC

There is no restriction on number of clients, hence you can uninstall Organizer client and reinstall it



Spectrum Info Solutions

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

Other software's

sales crm
EQMS

project timesheet
TIMETracker

service crm
service desk