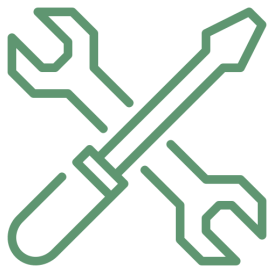sd

Basic edition

ServiceDesk
manage warranties & AMC

Getting Started (Trial Edition)
Quick start guide for ServiceDesk Basic Edition.

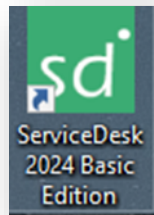# 1 | **INDEX**
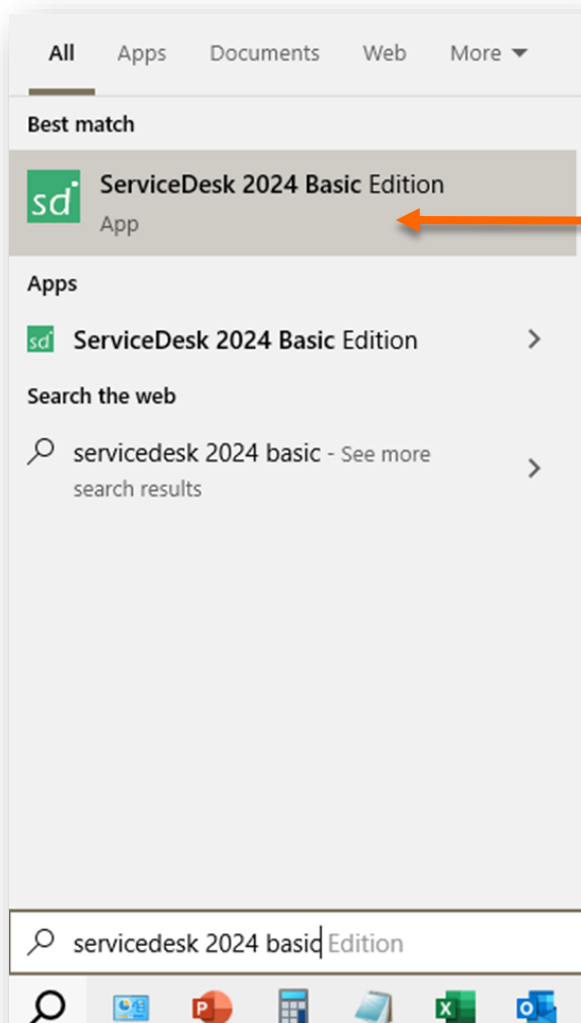
Getting Started Guide

2 LOGIN

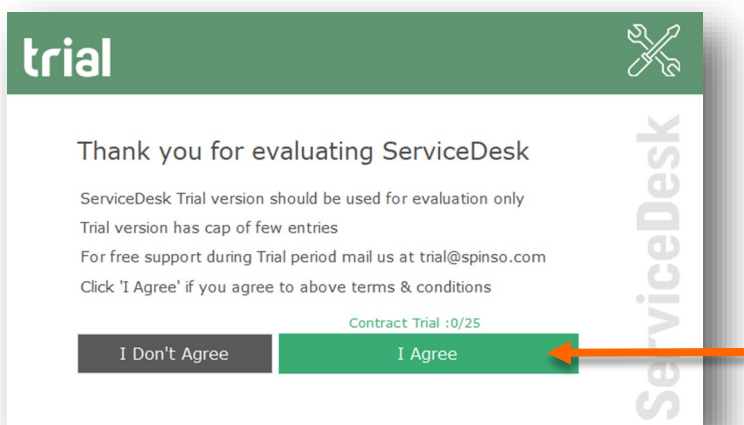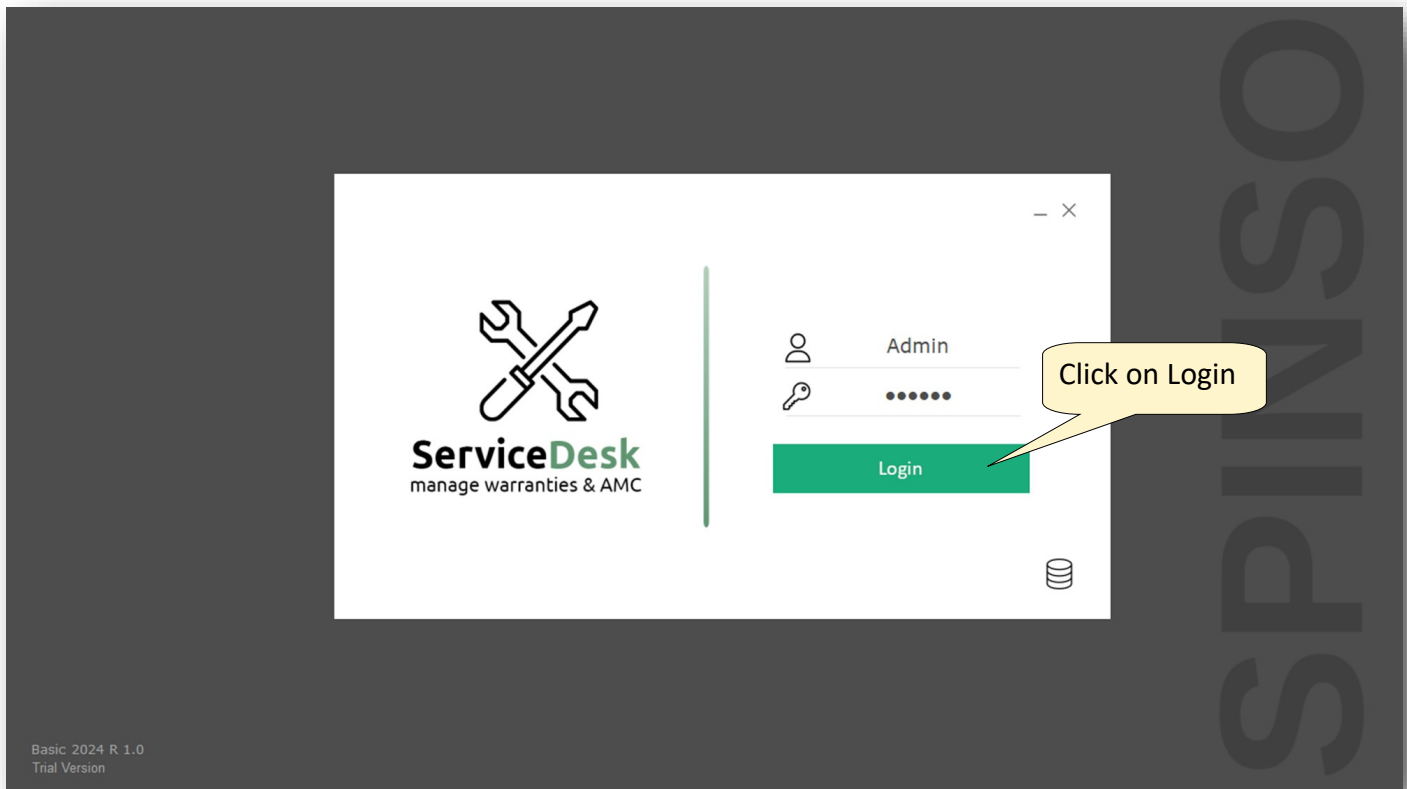Double Click on **ServiceDesk** icon, on your desktop.

or

You can also launch the application from
Start - Program Files - Spinso - ServiceDesk

Default login details:
•User Name : **admin**
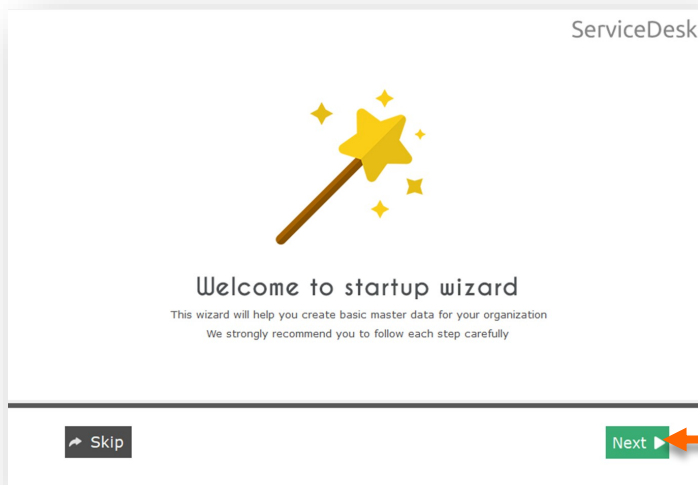•Password : **spinso**

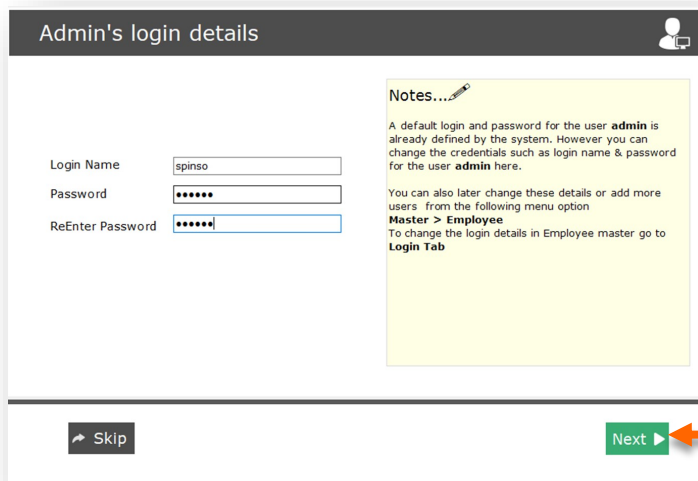Click on Login

Click on **I Agree**

3 WIZARD

- The wizard screen lets you quickly enter basic details required to create master's data like Employee and Product, etc. so that you can immediately start entering Contracts.

- This screen will appear only once when you login to the system for first time.

- Data entered through wizard can be seen in Master screen. You can also add or modify these details later, in the respective master's screens.

- Here we are using IT and Networking as an example for Business type. Kindly choose a Business type that is appropriate for your business.
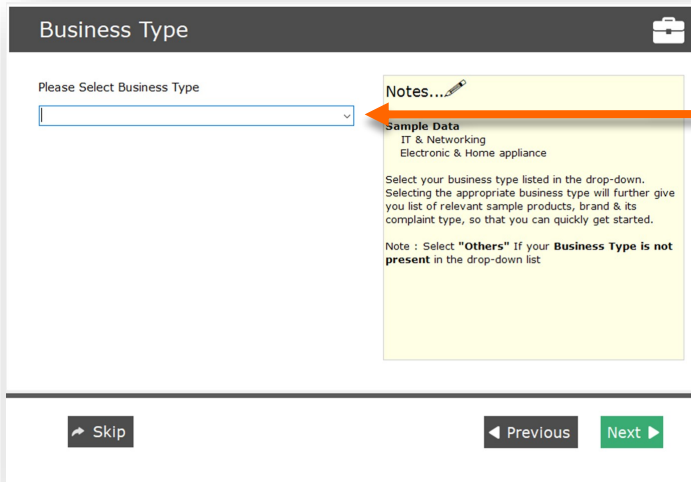

1 Click on **Next.**

2

Here, change Admin's Login Name & Password.
The new login name & Password will be used for your next login. Hence, kindly keep a note of these details.

Click on **Next.**

Business Type

Please Select Business Type

Notes...✎

Sample Data
  IT & Networking
  Electronic & Home appliance

Select your business type listed in the drop-down. Selecting the appropriate business type will further give you list of relevant sample products, brand & its complaint type, so that you can quickly get started.

Note : Select **"Others"** If your **Business Type is not present** in the drop-down list

➦ Skip   ◀ Previous   Next ▶

3 Click on the list.

Business Type

Please Select Business Type

Airconditioning
Cable & Internet Services
CCTV & Security System
Electronics & home appliances
Elevators
IT & Networking
Machinery & Equipments
Medical Equipment
Mobiles
Office Automation
Pest Control
Rental & Refills
Software
Solar & Renewable Energy
Water Purifiers
Weighing machines
Others

Notes...✎

Sample Data
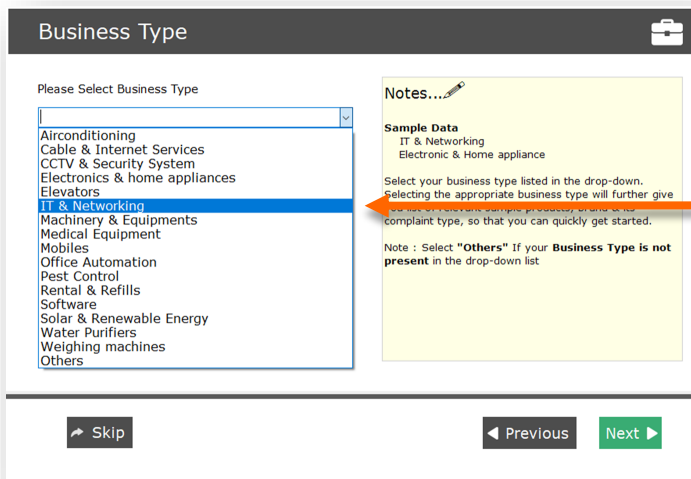 IT & Networking
  Electronic & Home appliance

Select your business type listed in the drop-down. Selecting the appropriate business type will further give you list of relevant sample products, brand & its complaint type, so that you can quickly get started.

Note : Select **"Others"** If your **Business Type is not present** in the drop-down list

➦ Skip   ◀ Previous   Next ▶

4 Select your business type from the list.

Here, we are using IT and Networking as an example for Business type. Kindly choose a Business type that is appropriate for your business.

Business Type

Please Select Business Type

IT & Networking

Notes...✎

Sample Data
  IT & Networking
  Electronic & Home appliance

Select your business type listed in the drop-down. Selecting the appropriate business type will further give you list of relevant sample products, brand & its complaint type, so that you can quickly get started.
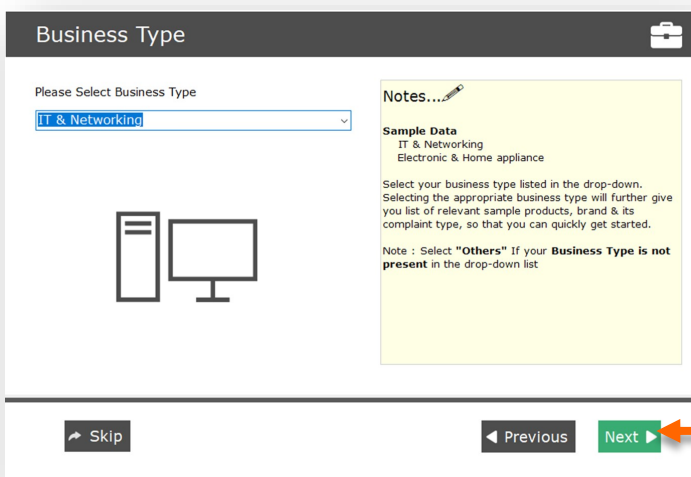
Note : Select **"Others"** If your **Business Type is not present** in the drop-down list

➦ Skip   ◀ Previous   Next ▶

5 Click on **Next**.

Employee

Please Enter Employee Name

Alex Fernandes
Riya DSouza
Mark Wilson

Notes...✏

Sample Data
John Smith
Rita Singh

Each employee should be entered in a new line.

In the above example by default **login name** and **password** assigned to both the employees, would be john & rita respectively.
However you have the option to change the login and password later from menu option
Master > Employee

Note : By default **first name** would be used for Login and Password

* Enter each employee in a new line

→ Skip   ◀ Previous   Next ▶

6 Enter employee name here, each name in a new line.
Click on **Next**.

Product Category

Please Enter Product Name

All-in-one Printers
CCTV
Desktop
Inkjet Printers
Laptops
Laser Printers
Projector
Server
Software
Tablets

Notes...✏

You can define the product here followed by the rate.

Each product should be added in a new line.

Later the product can be defined by the user having admin access through the following menu option
Master > Product

* Enter each Product in a new line

→ Skip   ◀ Previous   Next ▶

7 Enter Product here, each name in a new line.
Click on **Next**.

Contract Type

Please Enter Contract Type

Warranty
AMC
Labour only
Subscription

Notes...✏

Define the Contract Type for your service contracts.

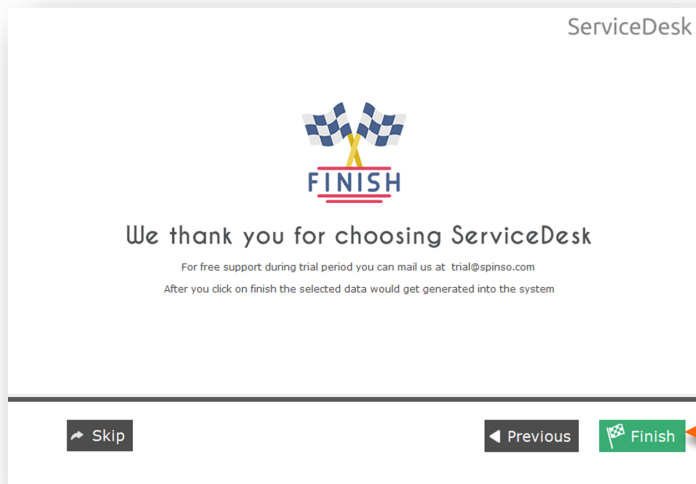You can add each contract type in a new line.

However you can later add or manipulate the Contract Type from the following menu option
Master > Parameters

Select the type "Contract Type" and add the Contract Types.

* Enter each contract in a new line

→ Skip   ◀ Previous   Next ▶

8 Enter Contract type here, each type in a new line.
Click on **Next**.

ServiceDesk

FINISH

We thank you for choosing ServiceDesk

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

After you click on finish the selected data would get generated into the system

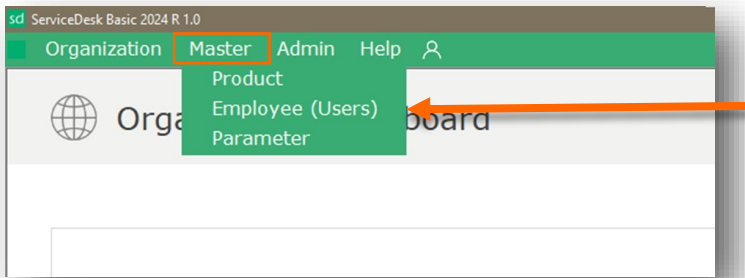➡ Skip   ◀ Previous   🏁 Finish
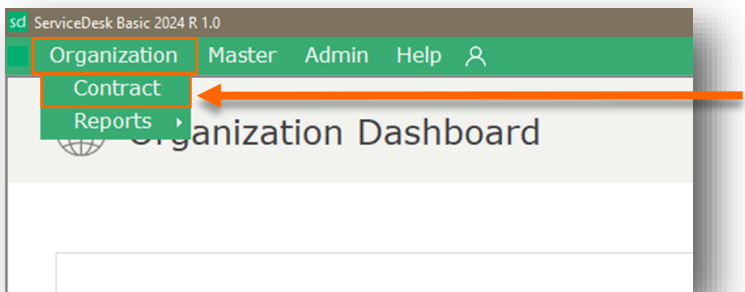
9 Click on **Finish.**

Wizard is completed

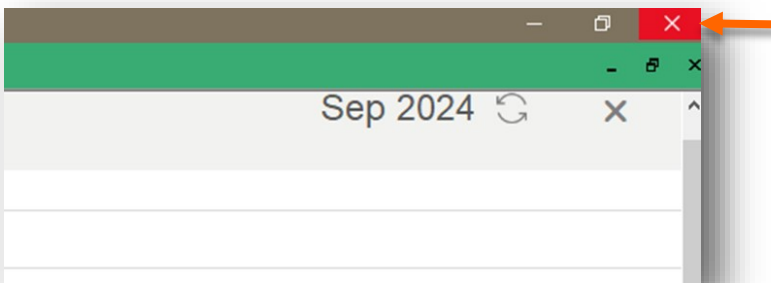**Next Step**: To view the data entered in the wizard refer the following steps

Note: If you wish to change or update wizard.

- **Master** —> **Product**; here you can add/ edit Product's name or price, etc.

- **Master** —> **Employee**; here you can add/ edit employee's name or password.

- **Master** —> **Parameter**; here you can add/edit Contract type.

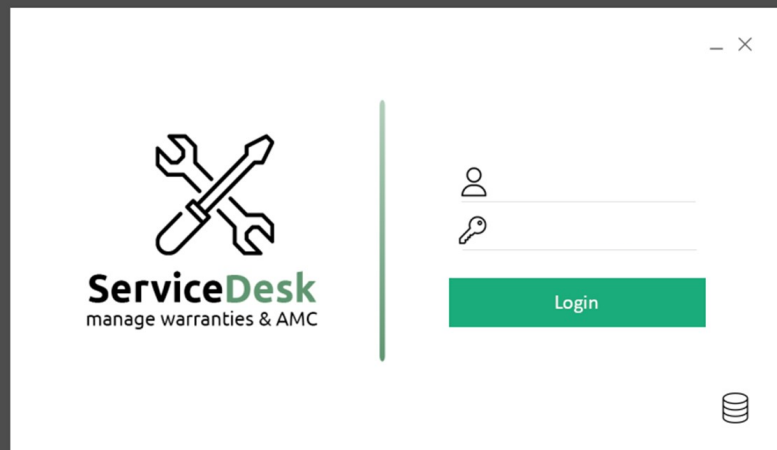You can immediately start adding Contracts from **Organization** —> **Contract**

Click on this exit button to close the application.

4 Re-Login

The next time, you login to our system, enter your new login credentials.

Thank you

For more information

Kindly Call us or WhatsApp **+91.99 201 401 00** for any queries.

For more info visit: spinso.com

Next step

First Contract
how to quickly enter your first contract in ServiceDesk Basic
SD Basic Entering-Your-First-Contract.pdf

SPINSO

Other software products

SalesTracker
manage leads & follow-ups

TimeTracker
manage timesheet & approvals

ComplaintTracker
manage customer complaints

QuotationTracker
create professional quotation