SPINSO

sd

servicedesk ^{Basic}

service CRM

1   Index

Getting Started

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.
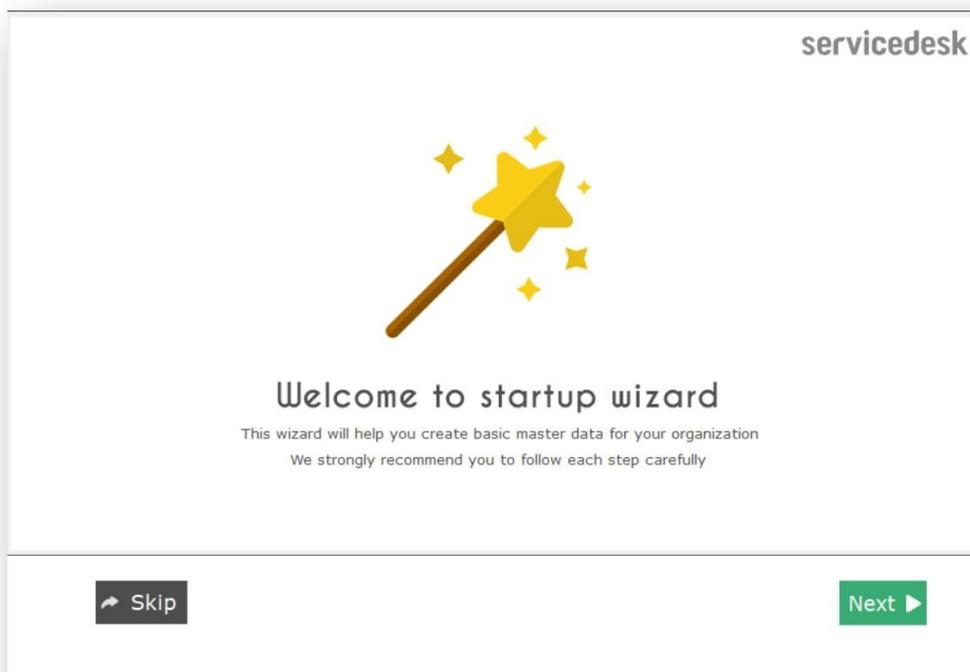
3.a How to enter data in Wizard

> **Please note**
>
> If you wish to skip this, you can also enter data via respective master screen
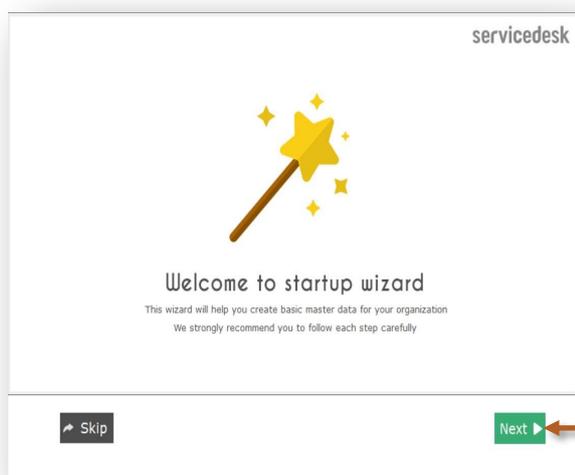
The first screen that appears in the wizard is the welcome screen, it is a start-up screen that gives brief introduction about the wizard.

Click **Next** to Continue
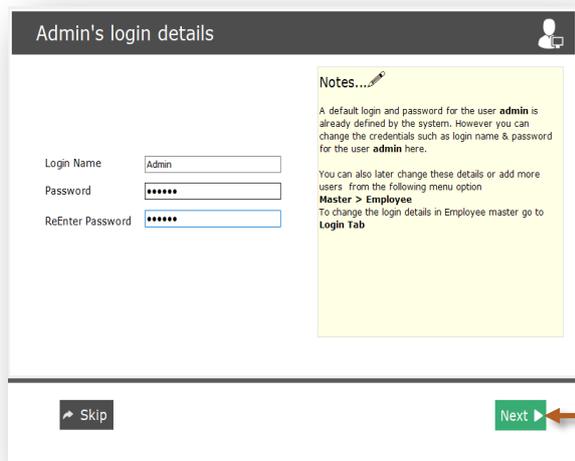
In this screen you can change Login Name and Password for Admin.

Click **Next** to Continue

Select your business type from drop down list.

Click **Next** to Continue

In employee wizard you can enter Employee/User names. In ServiceDesk Lite you get 3 user free license, Admin user is the default user created by the system, hence now you can add up to 2 more Employee/Users.

Sample Data

John Smith

Rita Singh

Click **Next** to Continue

Please note

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

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 **Next** to Continue

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 **Next** to Continue

This is the final screen in wizard.

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

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

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.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.

Lets see how to register complaint.
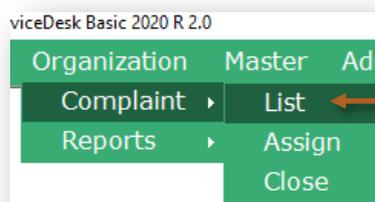
Go to menu

Organization — Complaint — List

Complaint screen can be broadly divided into 3 sections that is explained below

1. Toolbar to add, delete, Refresh, Print or Search data
2. List of Complaints to view the details
3. Complaints update section to add or modify the details

Please note

Complaint No. is auto generated, a unique number would be generated once you save it.

Enter details such as

Name
Contact Person
Address
Telephone No.
Mobile No(s)
Email
Model
Serial No.
Complaint Details
Select **Product** from the List
Select Complaint Type from
the List
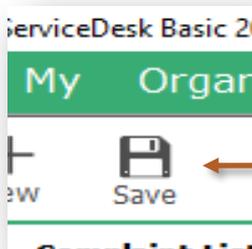
Click on **Save** on top toolbar to save the Complaint
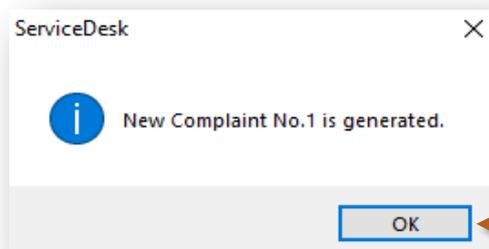
This indicates that your Complaint is saved

Click on **OK**

You can see saved Complaint in the grid view.

You can click on it to view the details below.

Please note

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

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.

Lets see how to assign complaint to service executive

Go to menu

Organization — Complaint — Assign
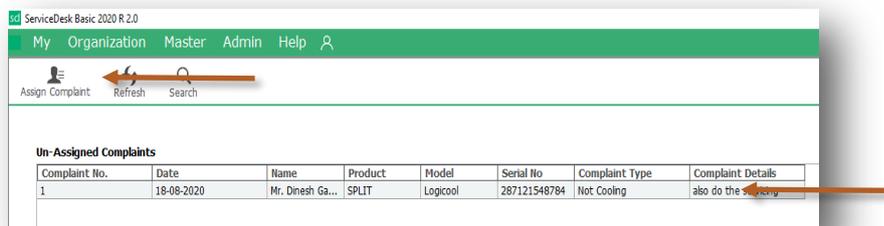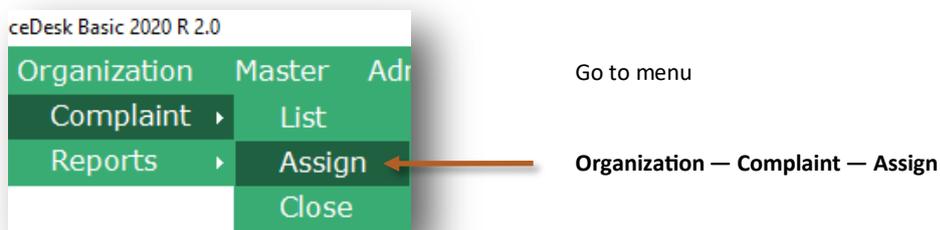
Select the Complaint and click on **Assign Complaint** in the top tool bar
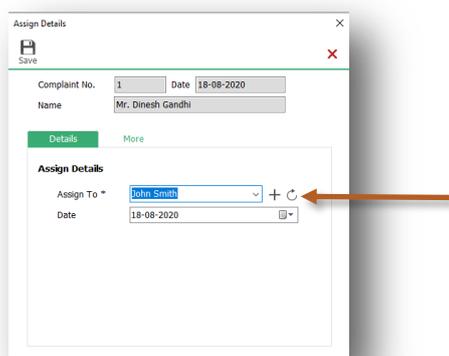
Select the service executive name from the list in **Assign To**

You can also change the **Date** of Assign

Click on **Save** to assign the Complaint
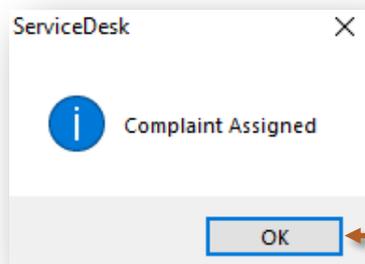
This indicates that your Complaint is Assigned

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 etc.

Lets see how to close complaint.

Go to menu

Organization — Complaint — Close

Select the Complaint and click on **Close Complaint** in the top tool bar
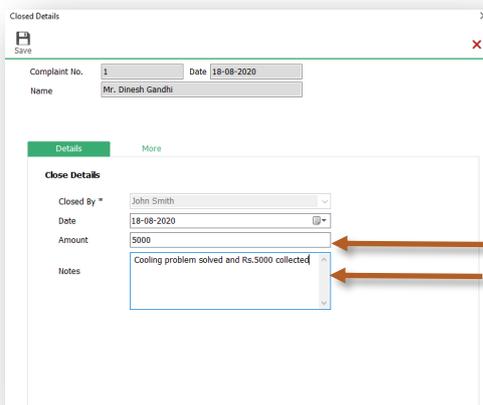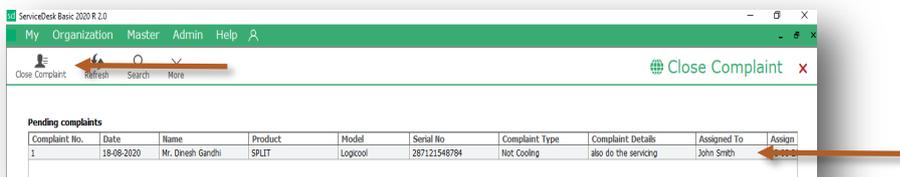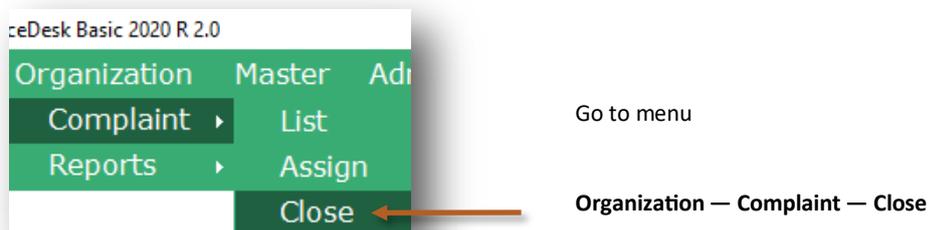
As you can see service executive name is already showing in Closed by because we have assign the complaint to him.

You can change the closure date if you want.

Enter Amount which we have charged to customer

Enter work details in the **Notes**
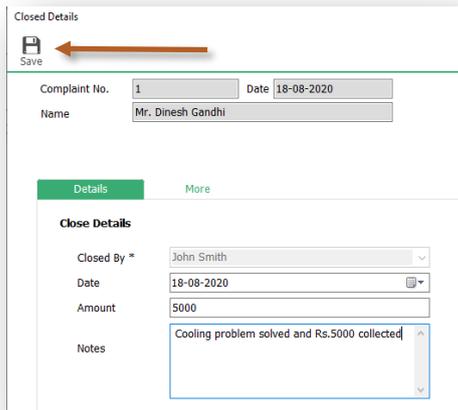
Click on **Save** to close the Complaint
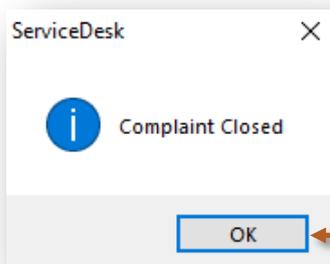
This indicates that your Complaint is Closed

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 full complaint details with closure by entering the complaint number.

Go to menu

Organization—Complaint—List
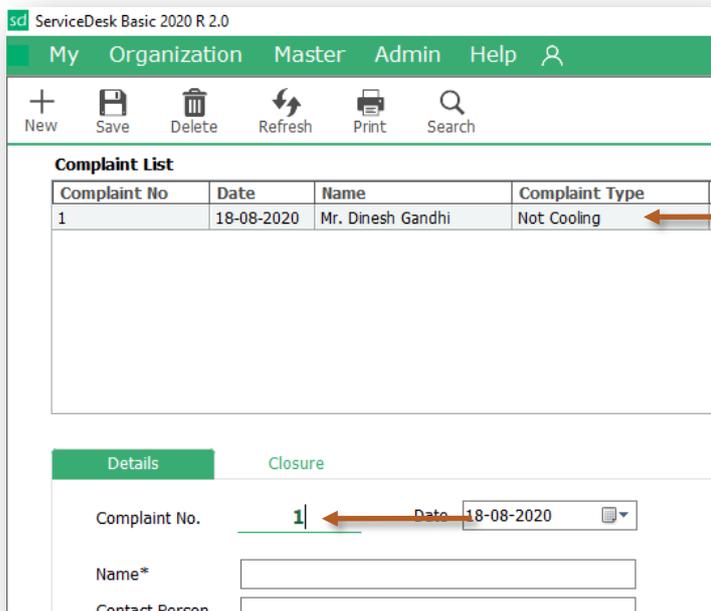
You can select the Complaint by clicking on it in the grid view.

You can also view the details by entering complaint number in the **Complaint No**. column then press Enter

You can see details of complaint.

Click on **Closure** tab to view closure details

You can see closure details like

Assigned To
Assign Date
Closed By
Closure Date
Amount
Notes
Pending Details

5   Reports

The reports give you the complete overview of service performance. It gives the complete history of complaint and its status.

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.

Reports are described in following 2 steps

5.a   Introduction of Reports

       5.a.1   Date Filter

       5.a.2   Smart Report

       5.a.3   Export to Excel

5.b   Organization— Reports

5.a Introduction of Reports

In Reports you can see filter, sort and aggregate the data for more details.

Lets see how to see Reports
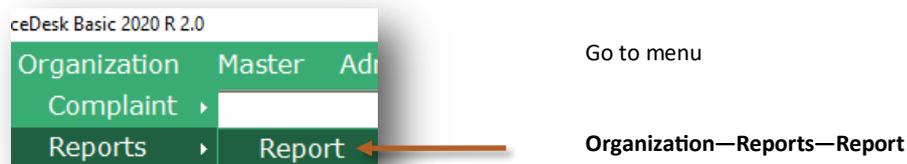
Go to menu

Organization—Reports—Report

1. Toolbar to filter datewise and smart reporting options
2. Report List
3. Data viewer grid

Lets see how to view report for **Complaint—List** where you will get the list of complaints which are entered.
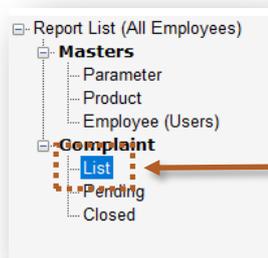
Click on **List**

By default current month data will be populated

Data is showing in the data viewer grids

Now we will see how to use Date Filter and Smart Report from top tool bar

5.a.1 Date Filter

In Date Filter we can filter the data for specific period or also we can see all data.

Lets see how to use **Date Filter**

Click on **Date Filter**

In Date Filter there are 2 options

5.a.1.a **All** *(You can see all data)*

5.a.1.b **Custom** *(You can see data for specific period)*
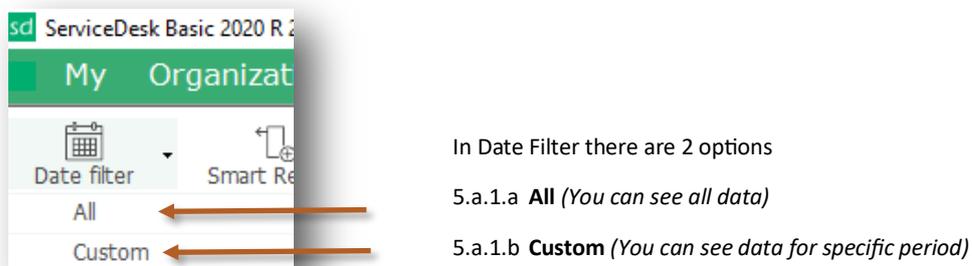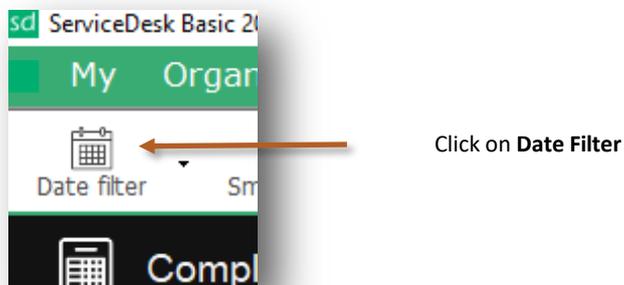
5.a.1.a   All

Now we will see how to view all data by using **All** option

Click on **All**
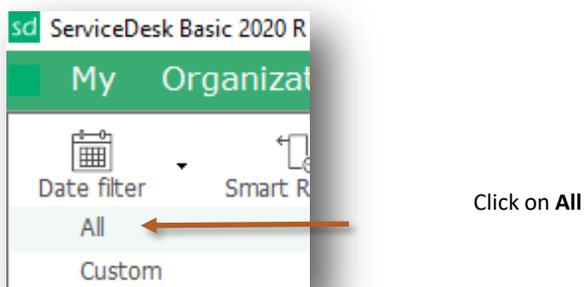
You can see All Complaints

Complaint No	Date	Name	Contact Person	Address	Telephone	Mobile No	Email
1	01-08-2020	Mr. Dinesh Gandhi		501, Dwarka Hills,	9820104152		dinesh.
2	02-08-2020	Ashok Enterprises		Lalwani Compound,	26936985		ashok@
3	03-08-2020	Millenium Zerox		112, Gurukrupa Avenue,	9823568956		navin54
4	05-08-2020	Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kur
5	07-08-2020	Vanraj Infotech		256, Millenium IT Park,	27886652		bakul@
6	09-08-2020	Nitin Verma		201, Siddhi Avenue,	9821548798		nitin547
7	11-08-2020	Maithili Bangera		605, Everest Apartment,	8775698569		maithili
8	12-08-2020	Vanraj Trading company		114, New Era Shopping...	26938574		Manoha
9	14-08-2020	Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kur
10	15-08-2020	Dilip Zaveri		112, Piramal Industrial...	9920415241		dilip96{
11	17-08-2020	Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kur

5.a.1.b Custom

Now we will see how to view data for particular period by using **Custom** option
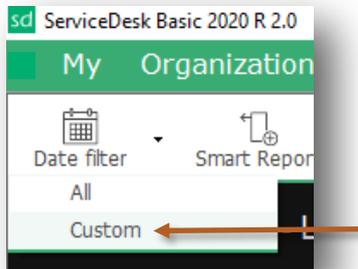
Click on **Custom**
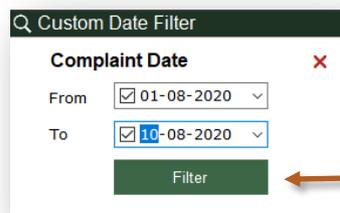
Select the period in **From Date** and **To** then click on **Filter**

Data is filtered for **01-08-2020** to **10-08-2020**

5.a.2   **Smart Reports**

In Smart Report we can Filter and Aggregate the data.

Lets see how to use **Smart Report**

Click on **Smart Report**

In Smart Report there are 2 options

5.a.2.a   **Filter** *(You can Filter the data with any column)*

5.a.2.b   **Aggregate** *(You can take count, average or sum for data)*
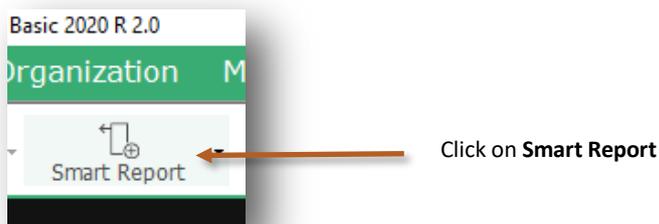
5.a.2.a   **Filter**

Now we will see how to filter data by using **Filter** option

Click on **Filter**

Filter option added

Select data from drop down list

Data is filtered for **SPLIT**

As you can see we filtered data for SPLIT. Lets see how to use multi filter with more column.

You can select multi filter for Name
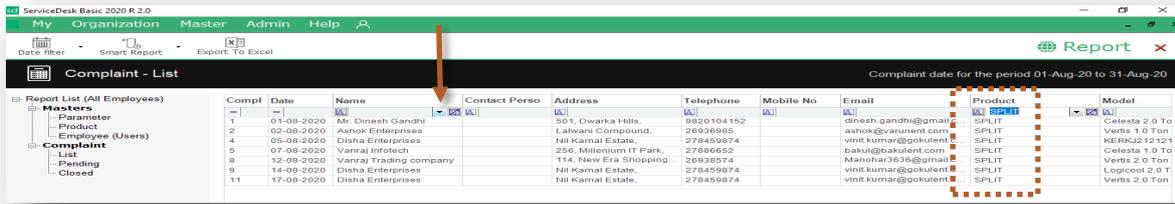
As you can see we have filtered SPLIT data for Disha Enterprises
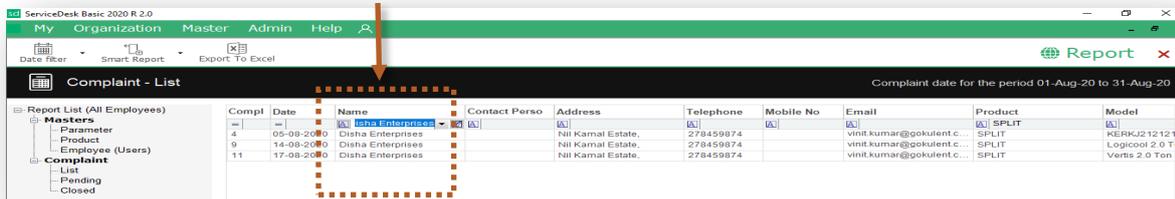
5.a.2.b   Aggregate

Lets see how to use Smart Report to **Aggregate** the data
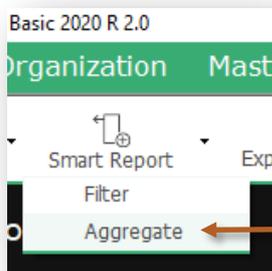
Click on Aggregate

Formula option added

Click on **Formula icon** and select **Count**

Count of Product

5.a.3   Export to Excel

Lets see how to export the data to excel

Click on **Export To Excel**

Click on **OK**

Data is exported to Excel

5.b Organization Reports

In Organization—Reports admin can see masters and all service executive's data in the reports. He can filter, sort and aggregate the data for more details.

Lets see how to see Organization-Reports

Go to Menu

Organization—Reports—Report

This is report list and now we will see more details about report list

Organization-Reports List

Masters

1 Parameter

You will get the list of all the Parameters with following fields.

Type, Name & Is Active

2 Product

You will get the list of all the Products with following fields.

Name, code, Price, Description & Is Active

3 Employee (Users)

You will get the list of all the Employees with following fields.

Name, Address, Telephone, Email, Login Name, Profile & Is Active

Complaint

4 List

You will get the list of Complaints for all the Service Executives with following fields.

Complaint No., Date, Name, Contact Person, Address, Telephone, Mobile No., Email, Product, Model, Serial Number, Assigned Date, Assigned To, closed Date, Closed By, Complaint Type, Complaint Details, Amount, Closed Notes & Pending Notes

5 Pending

You will get the list of pending Complaints for all the Service Executives with following fields.

Complaint No., Date, Name, Contact Person, Address, Telephone, Mobile No., Email, Product, Model, Serial Number, Assigned Date, Assigned To, Complaint Type, Complaint Details, Pending Days & Pending Notes

6 Closed

You will get the list of Complaints which are closed with following fields.

Complaint No., Date, Name, Contact Person, Address, Telephone, Mobile No., Email, Product, Model, Serial Number, Assigned Date, Assigned To, Closed Date, Closed By, Complaint Type, Complaint Details, No of Days, Amount, Closed Notes & Pending Notes

SPINSO

SalesTracker
sales CRM
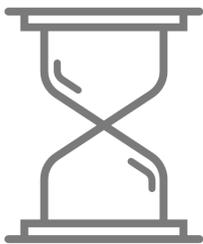
TimeTracker
timesheet

SPINSO.com