

sd

**servicedesk** Basic  
service CRM



## Getting Started

Quick start guide for ServiceDesk Basic Edition

## 1

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## Getting Started

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# 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

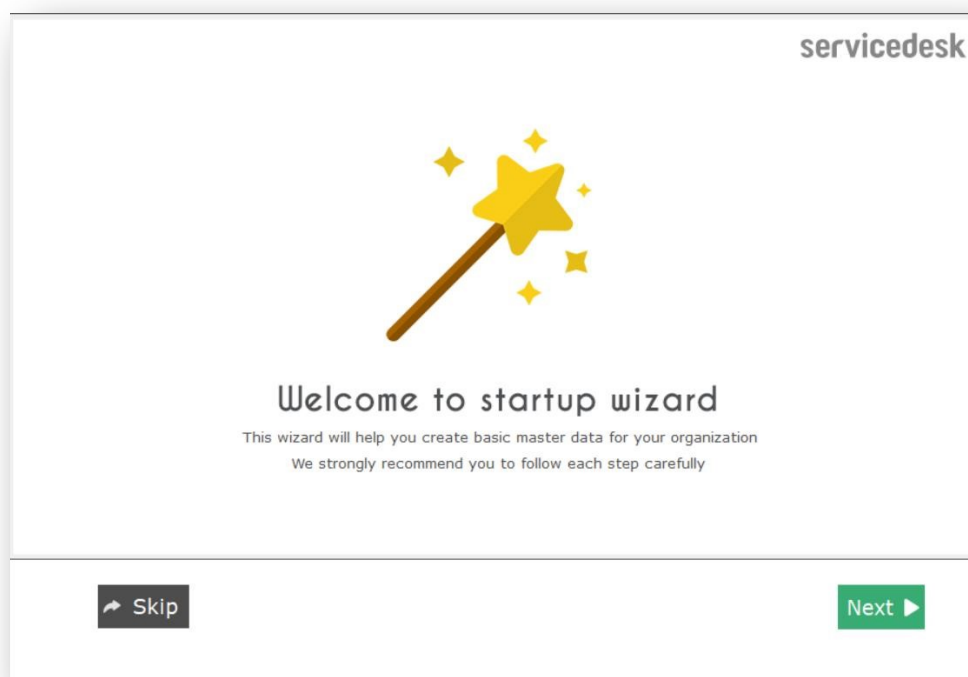
## 3 Wizard

### 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.



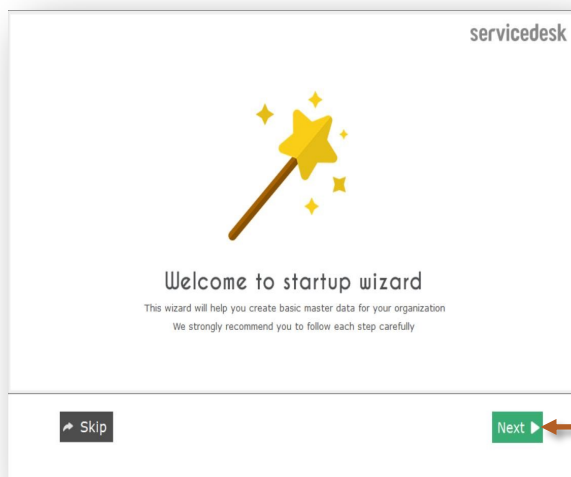
## 3.a

# 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**

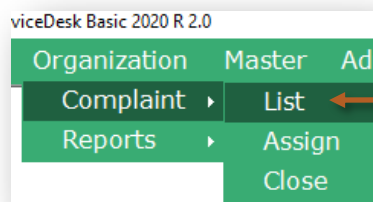
**4.d How to see complaint details**



## 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.

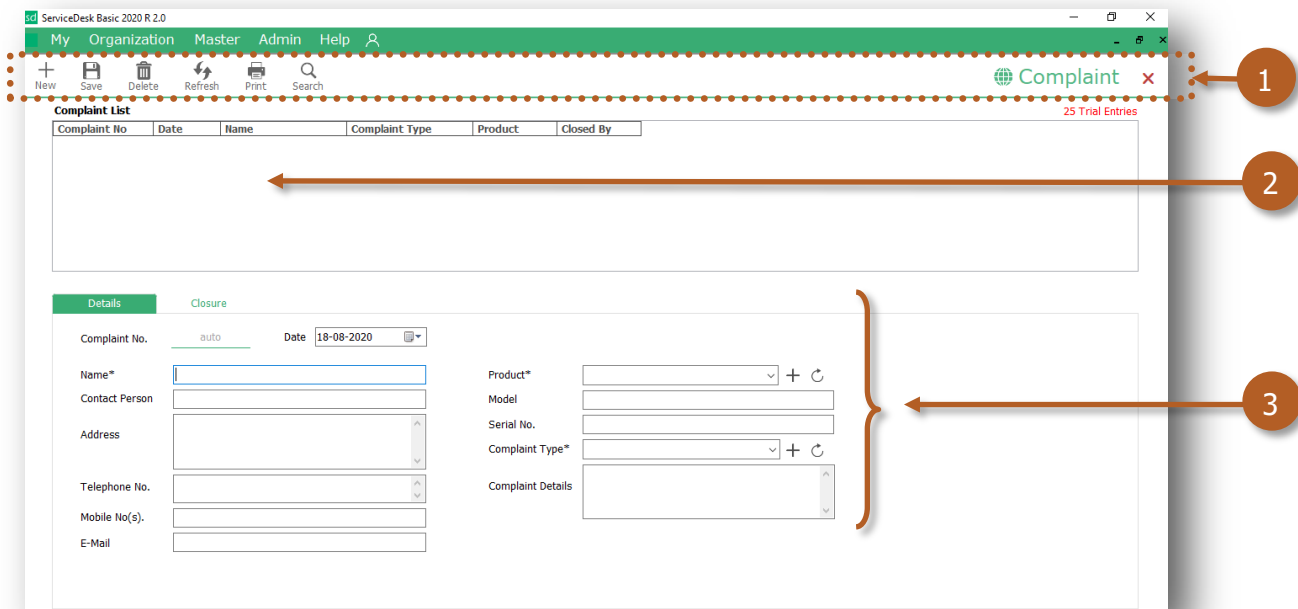
Lets see how to register complaint.



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

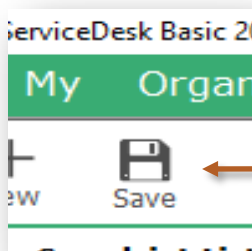
Complaint No. is auto generated, a unique number would be generated once you save it.

The screenshot shows a 'Details' form for a complaint. The form has two tabs: 'Details' (active) and 'Closure'. The 'Details' tab contains the following fields:

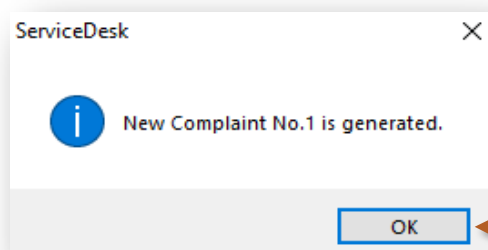
- Complaint No.: auto
- Date: 18-08-2020
- Name\*: Mr. Dinesh Gandhi
- Contact Person: Mr. Dinesh
- Address: S.V.Road, Andheri (W), Mumbai 400057
- Telephone No.: 26865241
- Mobile No(s): 8745125241
- E-Mail: dinesh.gandhi@gmail.com
- Product\*: SPLIT
- Model: Logicool
- Serial No.: 287121548784
- Complaint Type\*: Not Cooling
- Complaint Details: also do the servicing

### 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**

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New Save Delete Refresh Print Search

**Complaint List**

Complaint No	Date	Name	Complaint Type	Product	Closed By
1	18-08-2020	Mr. Dinesh Gandhi	Not Cooling	SPLIT	

You can see saved Complaint in the grid view.

You can click on it to view the details below.



### Please note

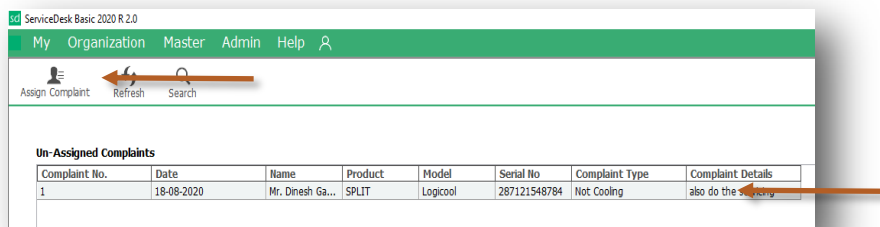
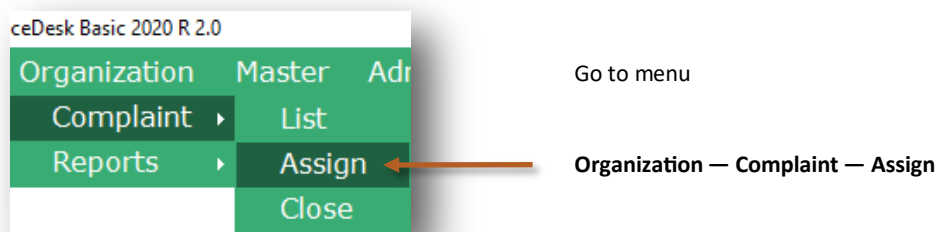
You can also select the service executive name in **Assigned To** in **Closure** tab, then the complaint will directly appear in the Closure screen, else it will appear in Assign screen

## 4.b How to assign complaint

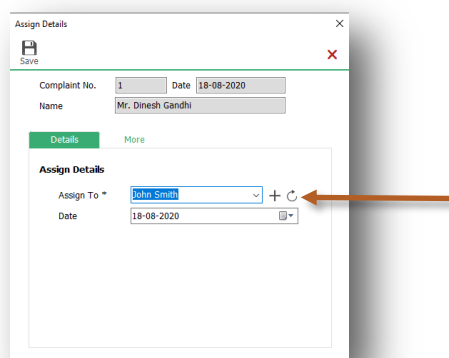
After complaint is registered, you can assign it to a service executive.

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

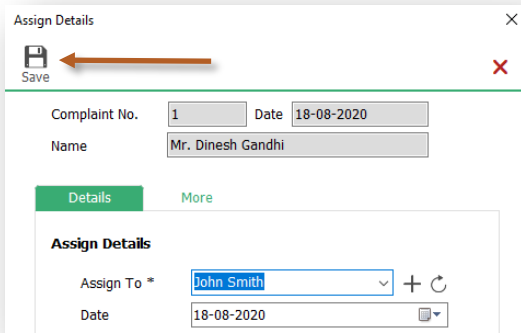


Select the Complaint and click on **Assign Complaint** in the top tool bar



Select the service executive name from the list in **Assign To**

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



Assign Details

Save

Complaint No.  Date

Name

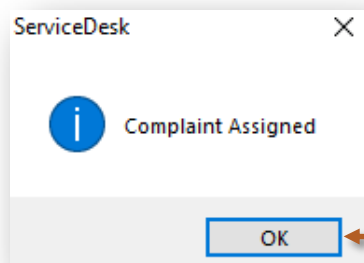
Details More

**Assign Details**

Assign To \*  + ↺

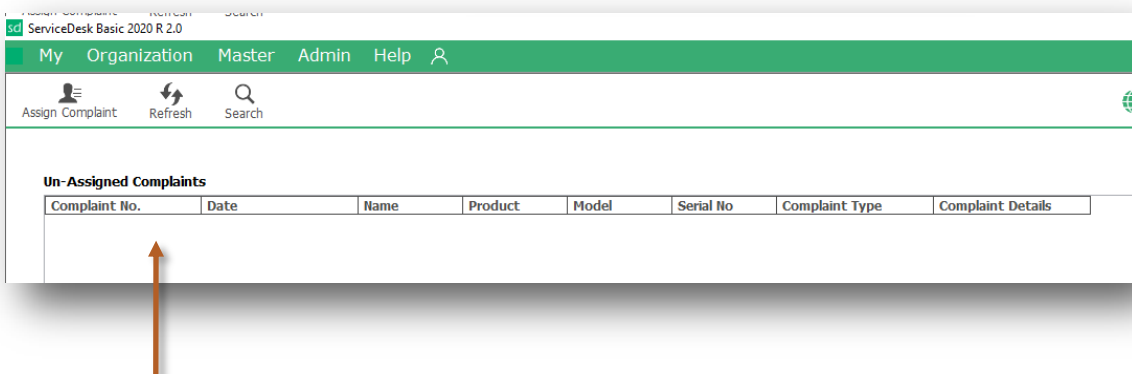
Date

Click on **Save** to assign the Complaint



This indicates that your Complaint is Assigned

Click on **OK**



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Assign Complaint Refresh Search

**Un-Assigned Complaints**

Complaint No.	Date	Name	Product	Model	Serial No	Complaint Type	Complaint Details

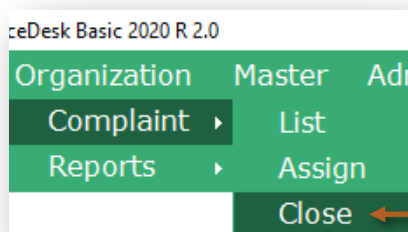
Now the Complaint is assigned to the service executive, hence it will move to the next stage that is Closure.

## 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.

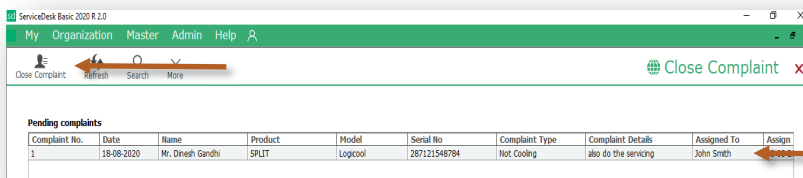
You can capture service closure details such as Closed Date, Closed by Service Executive, Work Done or measures taken, to resolve the issue, Status etc.

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

Save

Complaint No. 1 Date 18-08-2020

Name Mr. Dinesh Gandhi

Details More

**Close Details**

Closed By \* John Smith

Date 18-08-2020

Amount 5000

Notes Cooling problem solved and Rs.5000 collected

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.

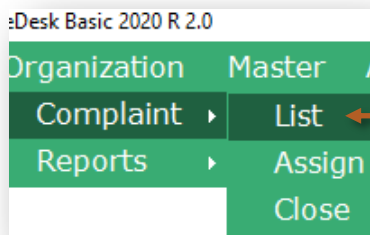
Enter Amount which we have charged to customer

Enter work details in the **Notes**



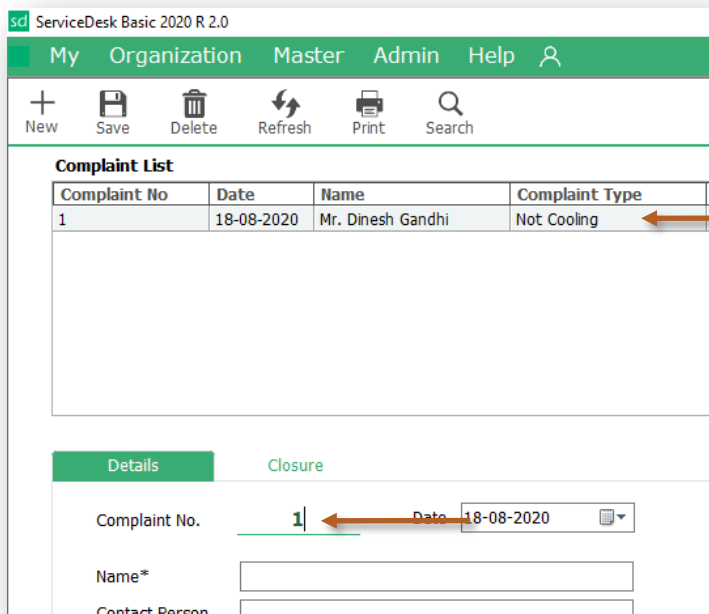
## 4.d How to view complaint details

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



Details Closure

Complaint No. 1 Date 18-08-2020

Name\* Mr. Dinesh Gandhi

Contact Person Mr. Dinesh

Address S, Dhruv Apartment, S.V.Road, Andheri (W), Mumbai 400057

Telephone No. 26865241

Mobile No(s). 8745125241

E-Mail dinesh.gandhi@gmail.com

Product\* SPLIT

Model Logicool

Serial No. 287121548784

Complaint Type\* Not Cooling

Complaint Details also do the servicing

You can see details of complaint.

Details Closure

Complaint No. 1 Date

Name\* Mr. Dinesh Gandhi

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

Details Closure

**Assigned Details**

Assigned To\* John Smith

Date 18-08-2020

**Pending Details**

Notes

**Closed Details**

Closed By John Smith

Date 18-08-2020

Amount 5000.00

Notes Cooling problem solved and Rs.5000 collected

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



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My Organization Master Admin Help

Date filter Smart Report Export To Excel

Report

Complaint - List

Complaint date for the period 01-Aug-20 to 31-Aug-20

Report List (All Employees)

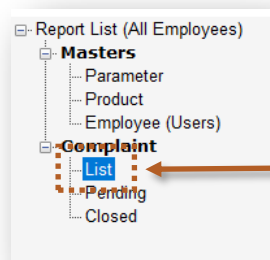
Masters

- Parameter
- Product
- Employee (Users)
- List
- Pending
- Closed

Complaint No	Date	Name	Contact Person	Address	Telephone	Mobile No	Email
1	01-08-2020	Nil Dinesh Gadhani		301, Dwarka Hills,	9020104132		niln@
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	Nilin Verma		201, Siddhi Avenue,	9821548798		nilin547
7	11-08-2020	Malthili Bangera		605, Everest Apartment	8775698569		malthili
8	12-08-2020	Vanraj Trading company		114, New Era Shopping...	26939574		Manohr
9	14-08-2020	Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kur
10	15-08-2020	Dillip Zaveri		112, Piramal Industrial...	9920415241		dillip96
11	17-08-2020	Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kur

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

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		ashokG
3	03-08-2020	Millenium Zerox		112, Gurukrupa Avenue,	9823568956		navin54
4	05-08-2020	Disha Enterprises		Nili 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		nitin54
7	11-08-2020	Maithili Bangera		605, Everest Apartment,	8775698569		maithili
8	12-08-2020	Vanraj Trading company		114, New Era Shopping...	26938574		Manohi
9	14-08-2020	Disha Enterprises		Nili Kamal Estate,	278459874		vinit.kur
10	15-08-2020	Dilip Zaveri		112, Piramal Industrial...	9920415241		dilip964
11	17-08-2020	Disha Enterprises		Nili Kamal Estate,	278459874		vinit.kur

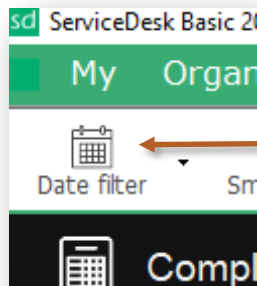
Data is showing in the data viewer grids

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

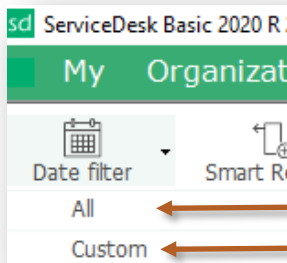
## 5.a.1 Date Filter

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**



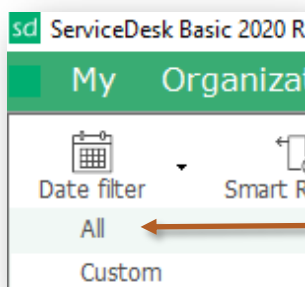
In Date Filter there are 2 options

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



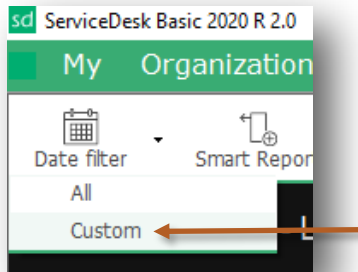
Click on **All**

You can see All Complaints

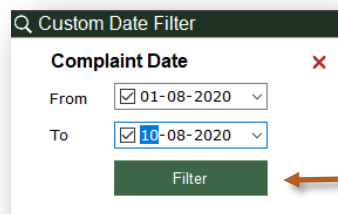
Complaint No	Date	Name	Contact Person	Address	Telephone	Mobile No	Email
1	01-08-2020	Mr. Dinesh Gandhi		501, Dwarka Hills,	9820104152		dinesh.
2	02-08-2020	Ashok Enterprises		Lalwani Compound,	26936985		ashok@
3	03-08-2020	Millenium Zerox		112, Gunkrupa Avenue,	9823568556		navin54
4	05-08-2020	Disha 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	Maitihli Bangera		605, Everest Apartment,	8775689569		maitihli
8	12-08-2020	Vanraj Trading company		114, New Era Shopping...	26938574		Manohi
9	14-08-2020	Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kur
10	15-08-2020	Dilip Zaveri		112, Piramal Industrial...	9920415241		dilip964
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**

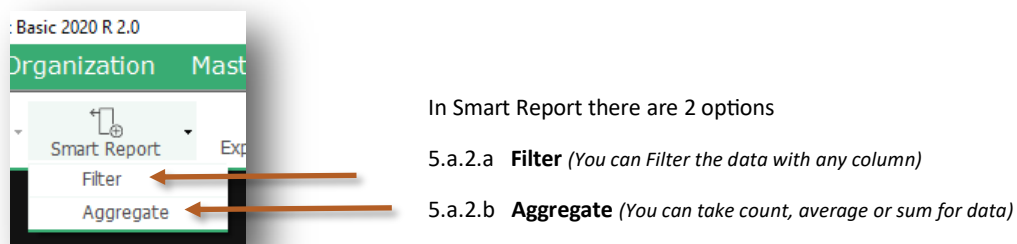
Data is filtered for 01-08-2020 to 10-08-2020

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 Zeror		112, Gunokrupa 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

## 5.a.2 Smart Reports

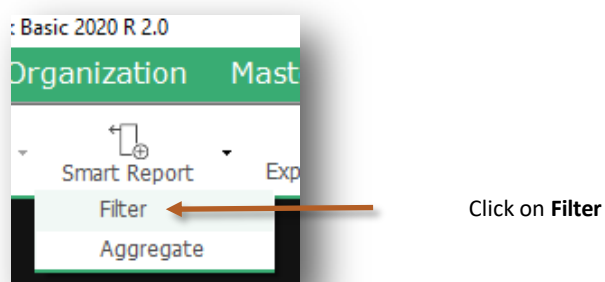
In Smart Report we can Filter and Aggregate the data.

Lets see how to use **Smart Report**



### 5.a.2.a Filter

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



Filter option added

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My Organization Master Admin Help

Date filter Smart Report Export To Excel

Report

Complaint - List Complaint date for the period 01-Aug-20 to 31-Aug-20

	Contact Person	Address	Telephone	Mobile No	Email	Product	Model
y Gandhi	501, Dwarka Hills,	9820104152			dinesh.gandhi@gmail.c...	SPLIT	Celesta 2.0 Ton
erprises	Lalwani Compound,	26936985			ashok@varunent.com	SPLIT	Vertis 1.0 Ton
Zerox	112, Gurukrupa Avenue,	9823568956			navin547@yahoo.com	Window	Vectra 1.5 Ton
erprises	Nii Kamal Estate,	278459874			vinit.kumar@gokulent.c...	SPLIT	KERKJ212121
tech	256, Millenium IT Park,	27886652			bakul@bakulent.com	SPLIT	Celesta 1.0 Ton
ja	201, Siddhi Avenue,	9821548798			nitin547@gmail.com	Window	Optima 1.5 Ton
ngera	605, Everest Apartment,	8775698569			maithili5@rediffmail.com	Ducted	Vertis 2.0 Ton
ding company	114, New Era Shopping...	26938574			Manohar3636@gmail.c...	SPLIT	Logicoool 2.0 Ton
erprises	Nii Kamal Estate,	278459874			vinit.kumar@gokulent.c...	SPLIT	Logicoool 1.0 Ton
ri	112, Piramal Industrial...	9920415241			dlip96@yahoo.com	Window	Vertis 2.0 Ton
erprises	Nii Kamal Estate,	278459874			vinit.kumar@gokulent.c...	SPLIT	Vertis 2.0 Ton

Select data from drop down list

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My Organization Master Admin Help

Date filter Smart Report Export To Excel

Report

Complaint - List Complaint date for the period 01-Aug-20 to 31-Aug-20

	Contact Person	Address	Telephone	Mobile No	Email	Product	Model
y Gandhi	501, Dwarka Hills,	9820104152			dinesh.gandhi@gmail.c...	SPLIT	Celesta 2.0 Ton
erprises	Lalwani Compound,	26936985			ashok@varunent.com	SPLIT	Vertis 1.0 Ton
Zerox	112, Gurukrupa Avenue,	9823568956			navin547@yahoo.com	Window	Vectra 1.5 Ton
erprises	Nii Kamal Estate,	278459874			vinit.kumar@gokulent.c...	SPLIT	Celesta 1.0 Ton
tech	256, Millenium IT Park,	27886652			bakul@bakulent.com	SPLIT	Optima 1.5 Ton
ja	201, Siddhi Avenue,	9821548798			nitin547@gmail.com	Window	Vertis 2.0 Ton
ngera	605, Everest Apartment,	8775698569			maithili5@rediffmail.com	Ducted	Logicoool 2.0 Ton
ding company	114, New Era Shopping...	26938574			Manohar3636@gmail.c...	SPLIT	Logicoool 1.0 Ton
erprises	Nii Kamal Estate,	278459874			vinit.kumar@gokulent.c...	SPLIT	Vertis 2.0 Ton
ri	112, Piramal Industrial...	9920415241			dlip96@yahoo.com	Window	Vertis 2.0 Ton
erprises	Nii Kamal Estate,	278459874			vinit.kumar@gokulent.c...	SPLIT	Vertis 2.0 Ton

Data is filtered for SPLIT

ServiceDesk Basic 2020 R 2.0

My Organization Master Admin Help

Date filter Smart Report Export To Excel

Report

Complaint - List Complaint date for the period 01-Aug-20 to 31-Aug-20

	Contact Person	Address	Telephone	Mobile No	Email	Product	Model
y Gandhi	501, Dwarka Hills,	9820104152			dinesh.gandhi@gmail.c...	SPLIT	Celesta 2.0 Ton
erprises	Lalwani Compound,	26936985			ashok@varunent.com	SPLIT	Vertis 1.0 Ton
erprises	Nii Kamal Estate,	278459874			vinit.kumar@gokulent.c...	SPLIT	KERKJ212121
erprises	256, Millenium IT Park,	27886652			bakul@bakulent.com	SPLIT	Celesta 1.0 Ton
ding company	114, New Era Shopping...	26938574			Manohar3636@gmail.c...	SPLIT	Vertis 2.0 Ton
erprises	Nii Kamal Estate,	278459874			vinit.kumar@gokulent.c...	SPLIT	Logicoool 2.0 Ton
erprises	Nii Kamal Estate,	278459874			vinit.kumar@gokulent.c...	SPLIT	Vertis 2.0 Ton

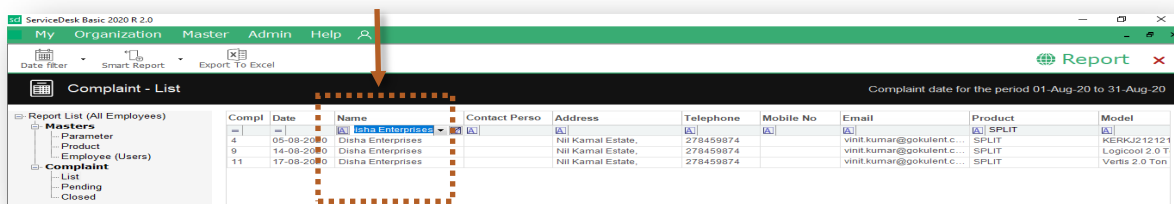
As you can see we filtered data for SPLIT. Lets see how to use multi filter with more column.



You can select multi filter for Name

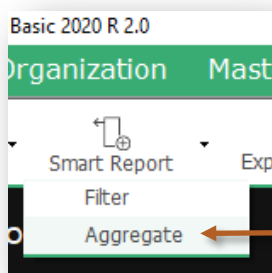


As you can see we have filtered SPLIT data for Disha Enterprises



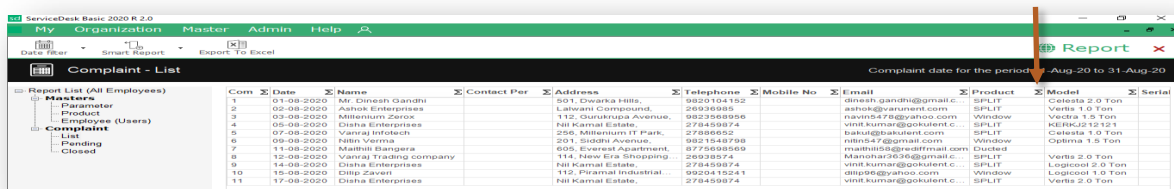
## 5.a.2.b Aggregate

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



Click on Aggregate

Formula option added



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

Complaint - List

Complaint date for the period 01-Aug-20 to 31-Aug-20

Report List (All Employees)

- Masters
  - Parameter
  - Product
  - Employee (Users)
- Complaint
  - List
  - Pending
  - Closed

Name	Contact Per	Address	Telephone	Mobile No	Email	Product	Model	Serial Number
Mr. Dinesh Gandhi		501, Dwarka Hills,	9820104152		dinesh.gandhi@gmail.c...			
Ashok Enterprises		Lalwani Compound,	26936985		ashok@varunent.com			
Millenium Zerox		112, Gurukrupa Avenue,	9823568956		navin5478@yahoo.com			
Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kumar@gokulent.c...			
Vanraj Infotech		256, Millenium IT Park,	27886652		bakul@bakulent.com			
Nitin Verma		201, Siddhi Avenue,	9821548798		nitin547@gmail.com			
Maithili Bangera		605, Everest Apartment,	8775698569		maithili58@rediffmail.com			
Vanraj Trading company		114, New Era Shopping...	26938574		Manohar3636@gmail.c...			
Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kumar@gokulent.c...			
Dilip Zaveri		112, Piramal Industrial...	9920415241		dilip96@yahoo.com			
Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kumar@gokulent.c...			

Select Summaries

☐ Average

☒ Count

☐ Maximum

☐ Minimum

☐ Sum

OK Cancel

Complaint - List

Complaint date for the period 01-Aug-20 to 31-Aug-20

Report List (All Employees)

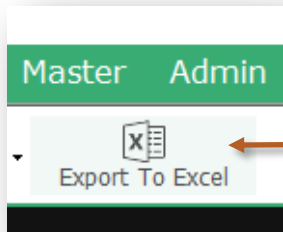
- Masters
  - Parameter
  - Product
  - Employee (Users)
- Complaint
  - List
  - Pending
  - Closed

Name	Contact Per	Address	Telephone	Mobile No	Email	Product	Model	Serial Number
Mr. Dinesh Gandhi		501, Dwarka Hills,	9820104152		dinesh.gandhi@gmail.c...	SPLIT	Celesta 2.0 Ton	
Ashok Enterprises		Lalwani Compound,	26936985		ashok@varunent.com	SPLIT	Vertis 1.0 Ton	
Millenium Zerox		112, Gurukrupa Avenue,	9823568956		navin5478@yahoo.com	Window	Vectra 1.5 Ton	
Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kumar@gokulent.c...	SPLIT	KERKJ212121	
Vanraj Infotech		256, Millenium IT Park,	27886652		bakul@bakulent.com	SPLIT	Celesta 1.0 Ton	
Nitin Verma		201, Siddhi Avenue,	9821548798		nitin547@gmail.com	Window	Optima 1.5 Ton	
Maithili Bangera		605, Everest Apartment,	8775698569		maithili58@rediffmail.com	Ducted		
Vanraj Trading company		114, New Era Shopping...	26938574		Manohar3636@gmail.c...	SPLIT	Vertis 2.0 Ton	
Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kumar@gokulent.c...	SPLIT	Logicool 2.0 Ton	
Dilip Zaveri		112, Piramal Industrial...	9920415241		dilip96@yahoo.com	Window	Logicool 1.0 Ton	
Disha Enterprises		Nil Kamal Estate,	278459874		vinit.kumar@gokulent.c...	SPLIT	Vertis 2.0 Ton	
						Count = 11		

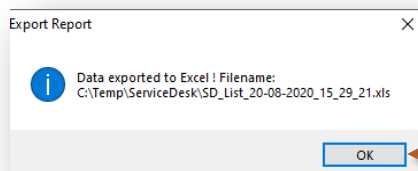
Count of Product

## 5.a.3 Export to Excel

Lets see how to export the data to excel



Click on **Export To Excel**



Click on **OK**

 A screenshot of an Excel spreadsheet titled 'SD\_List\_20-08-2020\_15\_29\_21.xls [Read-Only] [Compatibility Mode] - Excel'. The spreadsheet contains a table with 13 columns: Date, Name, Contact Person, Address, Telephone, Mobile No, Email, Product, Model, Serial Number, and Assigned Date. The data is organized into rows, with the first row (row 1) containing headers and subsequent rows (rows 2-14) containing individual records. An orange arrow points from the text 'Data is exported to Excel' to the first row of the data table.
 

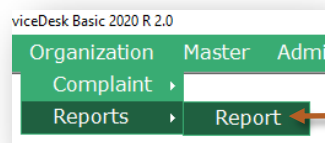
	A	B	C	D	E	F	G	H	I	J	K	L
	Complete	Date	Name	Contact Person	Address	Telephone	Mobile No	Email	Product	Model	Serial Number	Assigned Date
1		01-08-2020	Mr. Dinesh Gandhi		501, Dwarka Hills, S.V. Road	98201041152		dinesh.gandhi@gmail.com	SPLIT	Celesta 2.0 Ton		01-08-2020
2		02-08-2020	Ashok Enterprises		Lalwani Compound, Lala	9823568956		ashok@varunent.com	SPLIT	Vertis 1.0 Ton		
3		03-08-2020	Millenium Zerox		112, Gurukrupa Avenue, V	9823568956		navin5478@yahoo.com	Window	Vectra 1.5 Ton		
4		05-08-2020	Disha Enterprises		Nil Kamal Estate, Virvani N	278459874		vinil.kumar@gokulent.com	SPLIT	KERKJ212121		
5		07-08-2020	Vanraj Infotech		258, Millenium IT Park, Mah	27886652		bakul@bakulent.com	SPLIT	Celesta 1.0 Ton		
6		09-08-2020	Nitin Verma		201, Siddhi Avenue, Thakur	9821548798		nitin547@gmail.com	Window	Optima 1.5 Ton		
7		11-08-2020	Manoj Bangera		605, Everest Apartment, Sh	98775688569		mailthilil58@rediffmail.com	Ducted			
8		12-08-2020	Vanraj Trading company		114, New Era Shopping Ce	26938574		Manohar3636@gmail.com	SPLIT	Vertis 2.0 Ton		
9		14-08-2020	Disha Enterprises		Nil Kamal Estate, Virvani N	278459874		vinil.kumar@gokulent.com	SPLIT	Logicool 2.0 Ton		
10		15-08-2020	Dilip Zaveri		112, Piramal Industrial Est	9920415241		dilip96@yahoo.com	Window	Logicool 1.0 Ton		
11		17-08-2020	Disha Enterprises		Nil Kamal Estate, Virvani N	278459874		vinil.kumar@gokulent.com	SPLIT	Vertis 2.0 Ton		
12												
13												
14												

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**

Report List (All Employees)								
<div> <div>Report List (All Employees)</div> <div> <div>Masters</div> <div> <div>Parameter</div> <div>Product</div> <div>Employee (Users)</div> <div>Complaint</div> <div> <div>List</div> <div>Pending</div> <div>Closed</div> </div> </div> </div> </div>								
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		Lahwani 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	Maitihli Bangera		605, Everest Apartment,	8775698569		maitihli	
8	12-08-2020	Vanraj Trading company		114, New Era Shopping...	26938574		Manohi	
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	

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

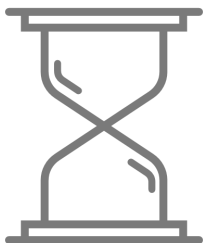
The SPINSO logo consists of the word "SPINSO" in a bold, white, sans-serif font, with a small registered trademark symbol (®) to the upper right of the 'O'. This text is centered within a large, solid dark gray circle.

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