3 Free users for life

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spinso

Lite Edition

servicedesk free

Manage Customer Complaints

Getting Started

Quick start guide for ServiceDesk Lite Edition

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Getting Started

2   **Introduction to ServiceDesk**

ServiceDesk Lite is free ready to use service management software that enables you to manage customer complaint lifecycle from complaint initiation, assignment to closure in a very simple way.

It is a single pc, multi-user application which supports up to 3 users. Ideal for individual and small business.

No registration required simply download, install and start using ServiceDesk Lite.

You can purchase more users in Lite or upgrade to higher edition for more features.

For free support mail us at info@spinso.com

Complaint Management

For service oriented firms it is very essential to timely respond to customer complaints, queries or issues, deliver quick service to build strong customer relationship and win more loyal customers. Usually lot of paperwork needs to be done to manage customer complaints.

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 and Product 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.
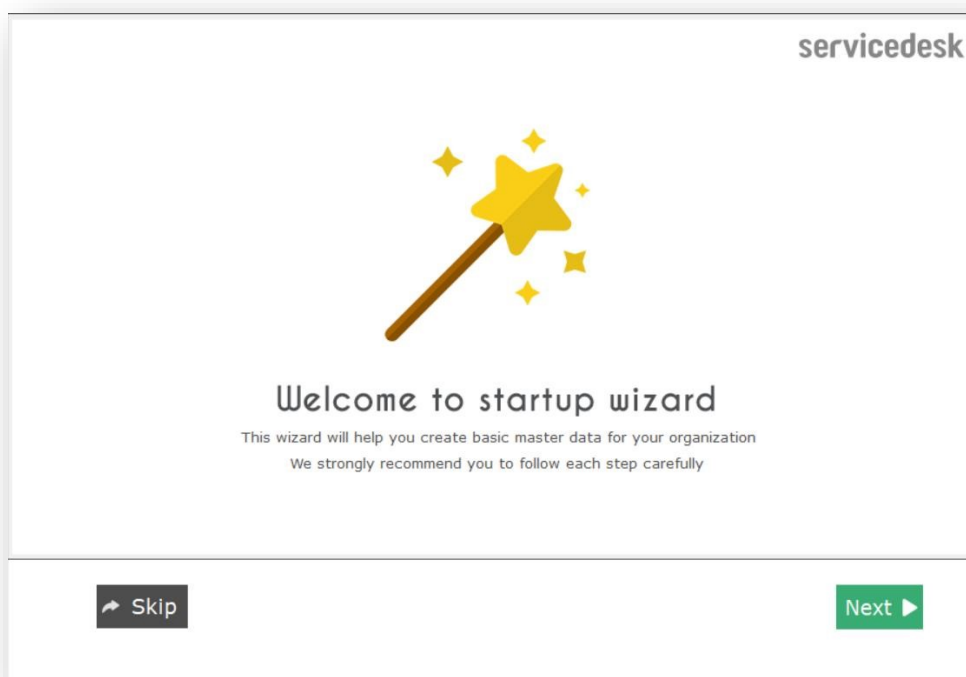
3.a   How to enter data in Wizard

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.

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 Technician/Engineers.

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** .

Product

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 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** .

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.

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 model and Complaint details. 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 Name in **Name**.

5.   Enter Customer Address in **Address**.

6.   Enter Customer Telephone No. in **Telephone no**.

7.   Enter Customer E-mail in **E-mail**.

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

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

10.   Enter **Complaint Details**.

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**

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

Complaint number is auto generated for New Complaint.

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

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 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, Address, Telephone No., Email Id and Complaint details.

Product details like Product and Model.

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

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.

Master Report List

Product : You will get the list of all the Products for which you are entering the complaints.

Employee (Users) : You will get the list of Employees (Technicians/Engineers) to whom you are assigning the Complaints.

Complaint Report List

Complaint 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 → 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 selecting the From date and To date in the Custom on the above toolbar.

You can also use **Smart Report** option to Filter and Aggregate the data.

Similarly you can generate other reports.

> ***Please note :***
>
> Reports provided in **Organization --> Report** are for all service executives. However, if you wish to view data for specific executive, you can filter the data using **smart report**.

Other software's

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Sales CRM

TimeTracker
Project Timesheet

Xplore
Digital catalog software

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