

sd

servicedesk Lite
free service CRM



Getting Started

Quick start guide for ServiceDesk Lite Edition

1

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Getting Started

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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 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

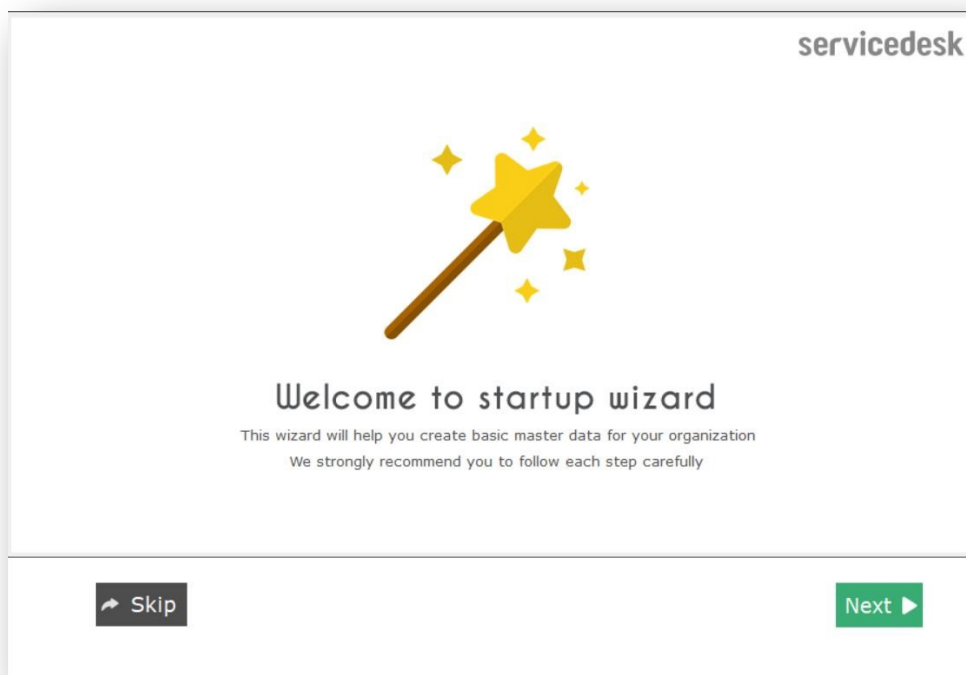
3 Wizard

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.



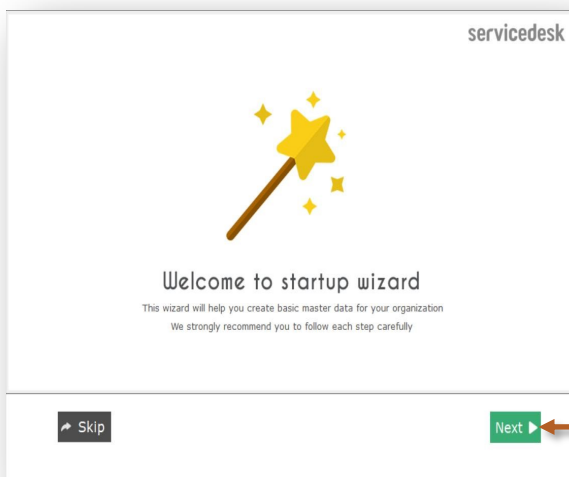
3.a

How to enter data in Wizard



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

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

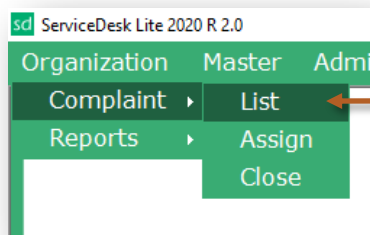
4.c How to close complaint

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.

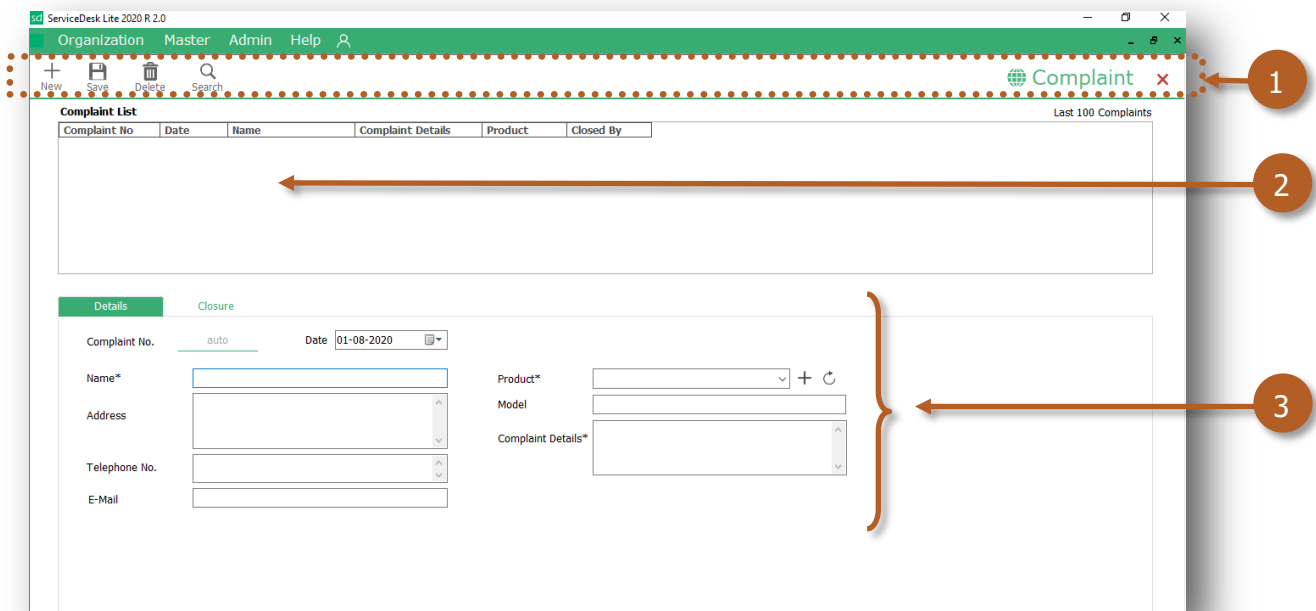
Lets see how to register complaint.



Go to menu

Organization—Complaint—List

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



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

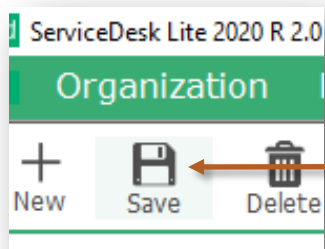


Please note

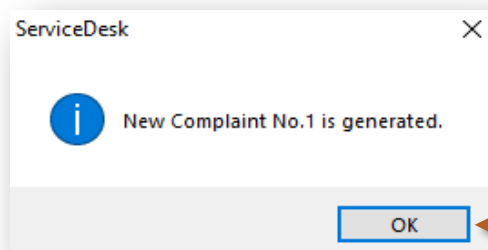
Complaint No. is auto generated, a unique number would be generated once you save it.

Enter details such as

Name
Address
Telephone No.
Email
Model
Complaint Details
Select **Product** from the List

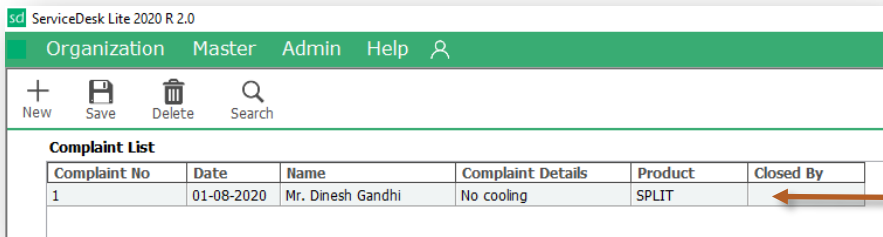


Click on **Save** on top toolbar to save the Complaint



This indicates that your Complaint is saved

Click on **OK**



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Organization Master Admin Help

New Save Delete Search

Complaint List

Complaint No	Date	Name	Complaint Details	Product	Closed By
1	01-08-2020	Mr. Dinesh Gandhi	No cooling	SPLIT	

You can see saved Complaint in the grid view.

You can click on it to view the details below.



Please note

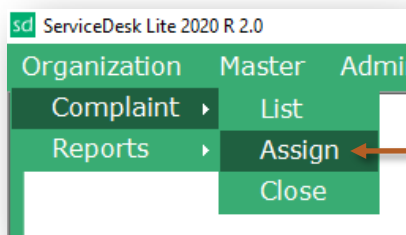
You can also select the service executive name in **Assigned To** in **Closure** tab, then the complaint will directly appear in the Closure screen, else it will appear in Assign screen

4.b How to assign complaint

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

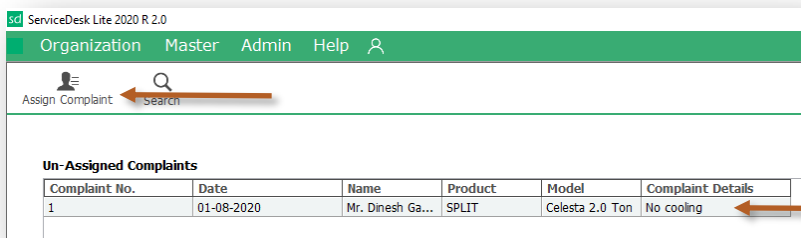
The Assign screen provides you the pending list of complaints that are yet to be assigned, so that you can quickly allocate it, to service executive.

Lets see how to assign complaint to service executive

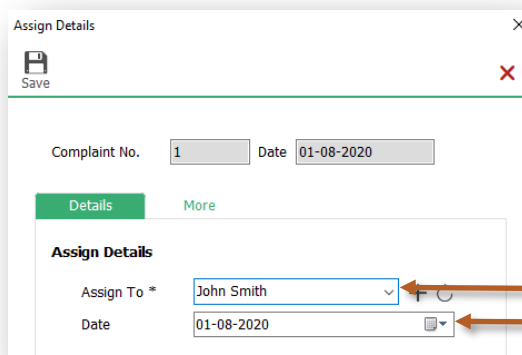


Go to menu

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

Assign Details

Save

Complaint No. 1 Date 01-08-2020

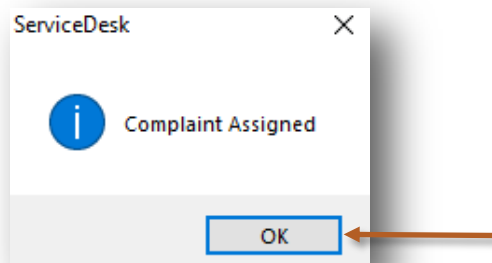
Details More

Assign Details

Assign To * John Smith + ↻

Date 01-08-2020

Click on **Save** to assign the Complaint



This indicates that your Complaint is Assigned

Click on **OK**

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Organization Master Admin Help

Assign Complaint Search

Un-Assigned Complaints

Complaint No.	Date	Name	Product	Model	Complaint Details

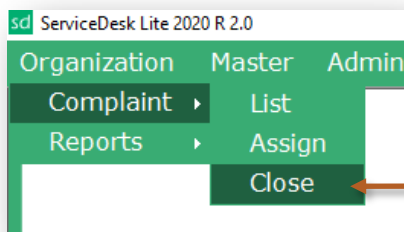
Now the Complaint is assigned to the service executive, hence it will move to the next stage that is Closure.

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.

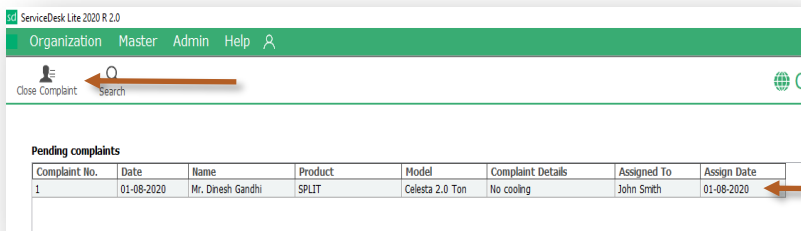
You can capture service closure details such as Closed Date, Closed by Service Executive, Work Done or measures taken, to resolve the issue, Status etc.

Lets see how to close complaint.

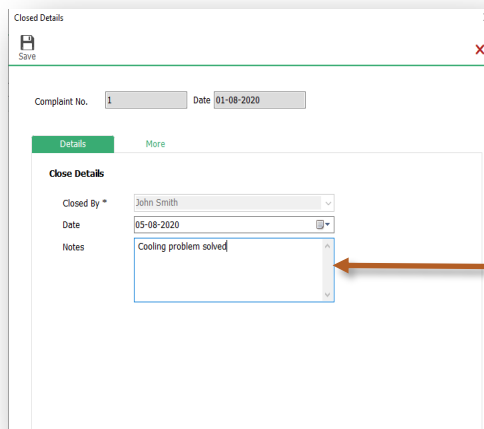


Go to menu

Organization—Complaint—Close



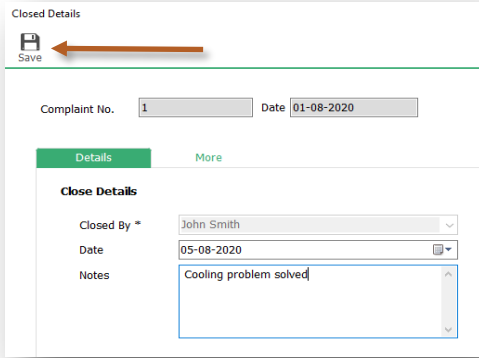
Select the Complaint and click on **Close Complaint** in the top tool bar



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 work details in the **Notes**



Closed Details

Save

Complaint No. 1 Date 01-08-2020

Details More

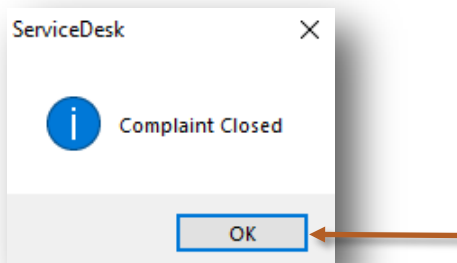
Close Details

Closed By * John Smith

Date 05-08-2020

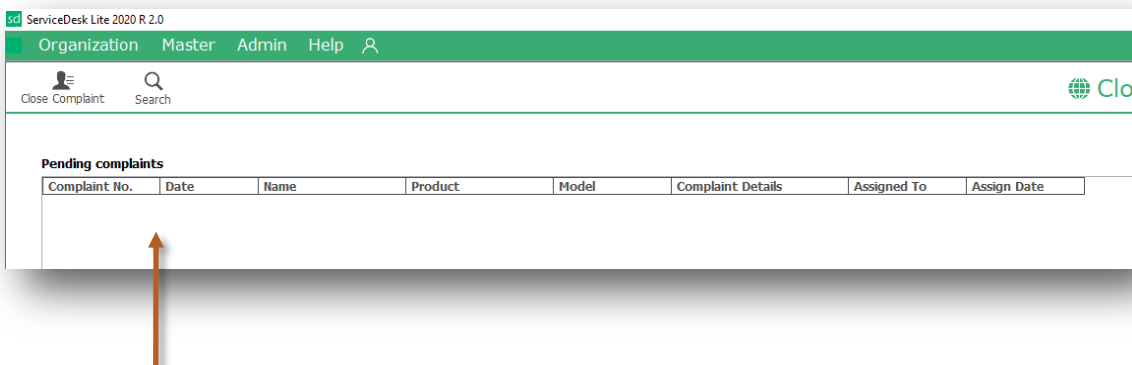
Notes Cooling problem solved

Click on **Save** to close the Complaint



This indicates that your Complaint is Closed

Click on **OK**



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Organization Master Admin Help

Close Complaint Search

Pending complaints

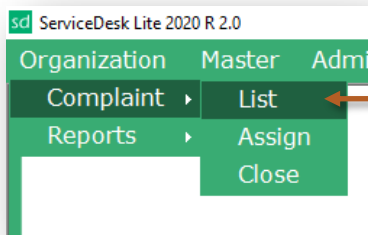
Complaint No.	Date	Name	Product	Model	Complaint Details	Assigned To	Assign Date

After complaint is closed it will not appear in the Closure screen.

In Reports you can view the closure details.

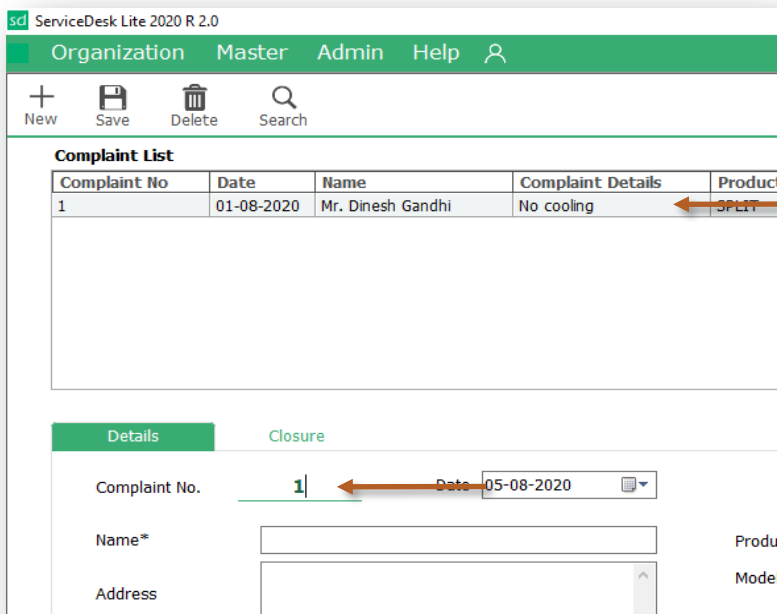
4.d How to view complaint details

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

Details | Closure

Complaint No. 1 Date 01-08-2020

Name* Mr. Dinesh Gandhi Product* SPLIT

Address 501, Dwarka Hills, S.V.Road, Borivali (W), Mumbai 400050 Model Celesta 2.0 Ton

Telephone No. 9820104152 Complaint Details* No cooling

E-Mail dinesh.gandhi@gmail.com

You can see details of complaint.

Details | Closure

Complaint No. 1 Date 01-08-2020

Name* Mr. Dinesh Gandhi

Address 501, Dwarka Hills, S.V.Road,

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

Details | Closure

Assigned Details

Assigned To * John Smith

Date 01-08-2020

Closed Details

Closed By John Smith

Date 05-08-2020

Notes Cooling problem solved

You can see closure details like

- Assigned To**
- Assign Date**
- Closed By**
- Closure Date**
- Notes**

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.

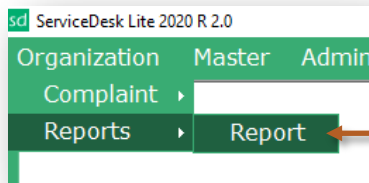
Reports are described in following 2 steps

- 5.a Introduction of Reports
 - 5.a.1 Date Filter
 - 5.a.2 Smart Report
- 5.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



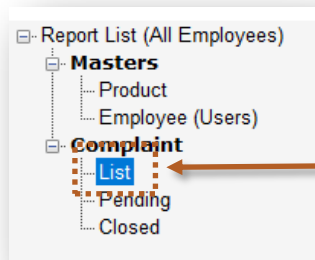
Go to menu

Organization—Reports—Report

Complaint No	Date	Name	Address	Telephone	Email	Product	Model
1	01-07-2020	Nir. Dinesh Ganoni	301, Dwarka Hills,	9826194152	nir.dinesh.ganoni@gmail.com	SPLIT	Genesia
2	02-07-2020	Ashok Enterprises	Lalwani Compound,	26936985	ashok@varunent.com	SPLIT	Vertis 1
3	03-07-2020	Millenium Zerex	112, Gurukrupa Avenue,	9823568956	navin5478@yahoo.com	Window	Vectra 1
4	05-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	Cassette	KERKJ
5	07-07-2020	Vanraj Infotech	256, Millenium IT Park,	27886652	bakul@bakulent.com	SPLIT	Celesta
6	09-07-2020	Nitin Verma	201, Siddhi Avenue,	9821548798	nitin547@gmail.com	Window	Optima
7	11-07-2020	Maithili Bangera	605, Everest Apartment,	8775698669	maithili58@rediffmail.com	Ducted	
8	12-07-2020	Vanraj Trading company	114, New Era Shopping...	26938574	Manohar636@gmail.c...	SPLIT	Vertis 2
9	14-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Logicoc
10	15-07-2020	Dilip Zaveri	112, Piramal Industrial...	9920415241	dilip96@yahoo.com	Window	Logicoc

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	Address	Telephone	Email	Product	Model
1	01-07-2020	Mr. Dinesh Gandhi	501, Dwarka Hills,	9820104152	dinesh.gandhi@gmail.c...	SPLIT	Celesta
2	02-07-2020	Ashok Enterprises	Lalwani Compound,	26936985	ashok@varunent.com	SPLIT	Vertis 1
3	03-07-2020	Millenium Zerox	112, Gurukrupa Avenue,	9823568956	navin5478@yahoo.com	Window	Vectra 1
4	05-07-2020	Disha Enterprises	Nil Kamal Estate,	278459874	vinit.kumar@gokulent.c...	Cassette	KERKJ
5	07-07-2020	Vanraj Infotech	256, Millenium IT Park,	27886652	bakul@bakulent.com	SPLIT	Celesta
6	09-07-2020	Nitin Verma	201, Siddhi Avenue,	9821548798	nitin547@gmail.com	Window	Optima
7	11-07-2020	Maithili Bangera	05, Everest Apartment,	8775698569	maithili58@rediffmail.com	Ducted	
8	12-07-2020	Vanraj Trading company	14, New Era Shopping...	26938574	Manohar3636@gmail.c...	SPLIT	Vertis 2
9	14-07-2020	Disha Enterprises	Nil Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Logicoc
10	15-07-2020	Dilip Zaveri	12, Piramal Industrial...	9920415241	dilip96@yahoo.com	Window	Logicoc

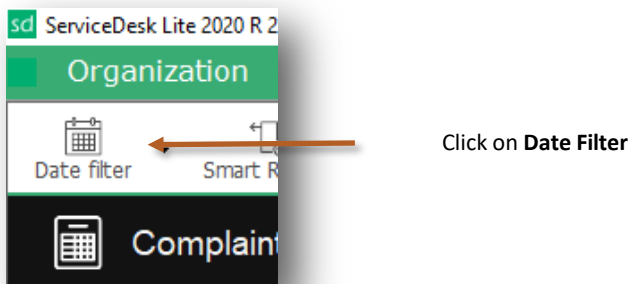
Data is showing in the data viewer grids

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

5.a.1 Introduction of Reports

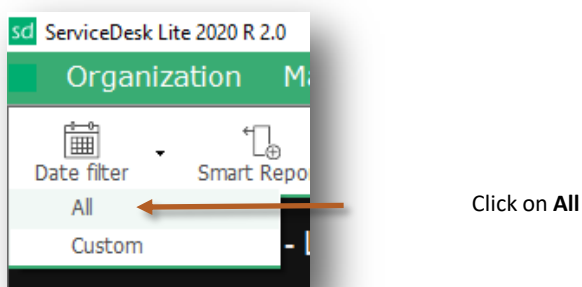
In Date Filter we can filter the data for specific period or also we can see all data.

Lets see how to use **Date Filter**



5.a.1.a All

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

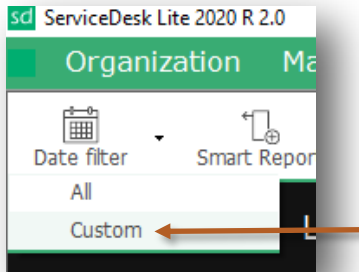


You can see All Complaints

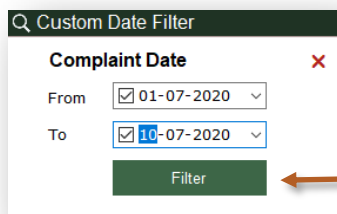
Complaint No	Date	Name	Address	Telephone	Email	Product	Model
1	01-07-2020	Mr. Dinesh Gandhi	501, Dwarka Hills,	9820104152	dinesh.gandhi@gmail...	SPLIT	Celesta
2	02-07-2020	Ashok Enterprises	Lalwani Compound,	26936985	ashok@varunent.com	SPLIT	Vertis 1
3	03-07-2020	Millenium Zerox	112, Gurukrupa Avenue,	9823568956	navin5478@yahoo.com	Window	Vectra 1
4	05-07-2020	Disha Enterprises	Nil Kamal Estate,	278459874	vinit.kumar@gokulent...	Cassette	KERKJ
5	07-07-2020	Vanraj Infolech	256, Millenium IT Park,	27888652	bakuji@bakulent.com	SPLIT	Celesta
6	09-07-2020	Nitin Verma	201, Siddhi Avenue,	9821548798	nitin547@gmail.com	Window	Optima
7	11-07-2020	Maithili Bangera	605, Everest Apartment,	8775698569	maithili58@rediffmail.com	Ducted	Vertis 2
8	12-07-2020	Vanraj Trading company	114, New Era Shopping...	26938574	Manohar3636@gmail...	SPLIT	Logicoc
9	14-07-2020	Disha Enterprises	Nil Kamal Estate,	278459874	vinit.kumar@gokulent...	SPLIT	Logicoc
10	15-07-2020	Dilip Zaveri	112, Piramal Industrial...	9920415241	dilip96@yahoo.com	Window	Logicoc

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 **01-07-2020** to **10-07-2020**

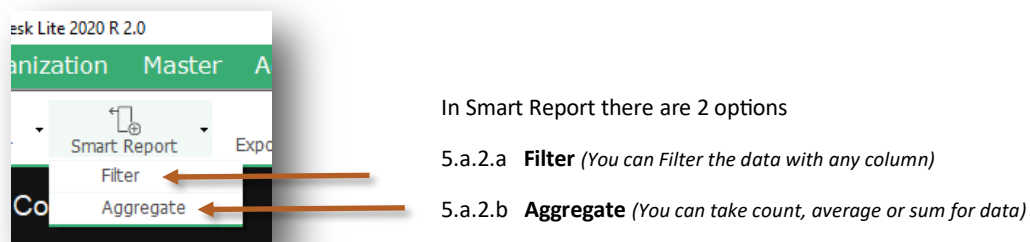


Complaint No	Date	Name	Address	Telephone	Email	Product	Model
1	01-07-2020	Mr. Dinesh Gandhi	501, Dwarka Hills,	9820104152	dinesh.gandhi@gmail.c...	SPLIT	Celesta
2	02-07-2020	Ashok Enterprises	Lalwani Compound,	26936995	ashok@varunent.com	SPLIT	Veris 1
3	03-07-2020	Millenium Zerox	112, Gupkrupa Avenue,	9823568956	navin547@yahoo.com	Window	Vectra
4	05-07-2020	Disha Enterprises	Nil Kamal Estate,	278459874	vinitkumar@pckulent.c...	Cassette	KEBKI
5	07-07-2020	Vanraj Infotech	256, Millenium IT Park,	27886652	bakul@bakulent.com	SPLIT	Celesta
6	09-07-2020	Nitin Verma	201, Siddhi Avenue,	9821548798	nitin547@gmail.com	Window	Optima

5.a.2 Smart Reports

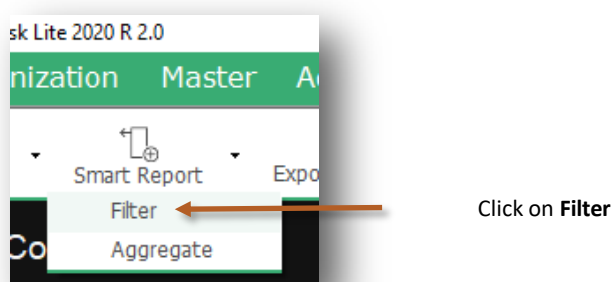
In Smart Report we can Filter and Aggregate the data.

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

Complaint No	Date	Name	Address	Telephone	Email	Product	Model
1	01-07-2020	Mr. Dinesh Gandhi	501, Dwarka Hills,	9820104152	dinesh.gandhi@gmail.c...	SPLIT	Celesta
2	02-07-2020	Ashok Enterprises	Lalwani Compound,	26936985	ashok@varunent.com	SPLIT	Vertis 1
3	03-07-2020	Millenium Zerox	112, Gurukrupa Avenue,	9823568956	navin5478@yahoo.com	Window	Vectra 1
4	05-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	Cassette	KERKJ
5	07-07-2020	Vanraj Infotech	256, Millenium IT Park,	27886652	bakul@bakulent.com	SPLIT	Celesta
6	09-07-2020	Nitin Verma	201, Siddhi Avenue,	9821548798	nitin547@gmail.com	Window	Optima
7	11-07-2020	Maithili Bangera	605, Everest Apartment,	8775698569	maithili58@rediffmail.com	Ducted	
8	12-07-2020	Vanraj Trading company	114, New Era Shopping...	26938574	Manohar3636@gmail.c...	SPLIT	Vertis 2
9	14-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Logicoc
10	15-07-2020	Dilip Zaveri	112, Piramal Industrial...	9920415241	dilip96@yahoo.com	Window	Logicoc

Select data from drop down list

Complaint No	Date	Name	Address	Telephone	Email	Product	Model
1	01-07-2020	Mr. Dinesh Gandhi	501, Dwarka Hills,	9820104152	dinesh.gandhi@gmail.c...	SPLIT	Celesta
2	02-07-2020	Ashok Enterprises	Lalwani Compound,	26936985	ashok@varunent.com	SPLIT	Vertis 1
3	03-07-2020	Millenium Zerox	112, Gurukrupa Avenue,	9823568956	navin5478@yahoo.com	Window	Vectra 1
4	05-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	Cassette	KERKJ
5	07-07-2020	Vanraj Infotech	256, Millenium IT Park,	27886652	bakul@bakulent.com	SPLIT	Celesta
6	09-07-2020	Nitin Verma	201, Siddhi Avenue,	9821548798	nitin547@gmail.com	Window	Optima
7	11-07-2020	Maithili Bangera	605, Everest Apartment,	8775698569	maithili58@rediffmail.com	Ducted	
8	12-07-2020	Vanraj Trading company	114, New Era Shopping...	26938574	Manohar3636@gmail.c...	SPLIT	Vertis 2
9	14-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Logicoc
10	15-07-2020	Dilip Zaveri	112, Piramal Industrial...	9920415241	dilip96@yahoo.com	Window	Logicoc

Data is filtered for SPLIT

Complaint No	Date	Name	Address	Telephone	Email	Product	Model
1	01-07-2020	Mr. Dinesh Gandhi	501, Dwarka Hills,	9820104152	dinesh.gandhi@gmail.c...	SPLIT	Celesta
2	02-07-2020	Ashok Enterprises	Lalwani Compound,	26936985	ashok@varunent.com	SPLIT	Vertis 1
5	07-07-2020	Vanraj Infotech	256, Millenium IT Park,	27886652	bakul@bakulent.com	SPLIT	Celesta
8	12-07-2020	Vanraj Trading company	114, New Era Shopping...	26938574	Manohar3636@gmail.c...	SPLIT	Vertis 2
9	14-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Logicoc

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

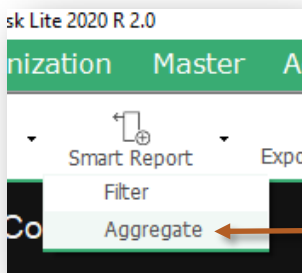
Complaint No	Date	Name	Address	Telephone	Email	Product	Model
1	01-07-2020	Mr. Dinesh Gandhi	501, Dwarka Hills,	9820104152	dinesh.gandhi@gmail...	SPLIT	Celesta
2	02-07-2020	Ashok Enterprises	Lalwani Compound,	26936985	ashok@varunent.com	SPLIT	Vertis 1
5	07-07-2020	Vanraj Infotech	256, Millenium IT Park,	27886652	bakul@bakulent.com	SPLIT	Celesta
8	12-07-2020	Vanraj Trading company	114, New Era Shopping...	26938574	Manohar3636@gmail...	SPLIT	Vertis 2
9	14-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent...	SPLIT	Logicc

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

Complaint No	Date	Name	Address	Telephone	Email	Product	Model
4	05-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	KERKJ
9	14-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Logicc
11	17-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Vertis 2

5.a.2.b Aggregate

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

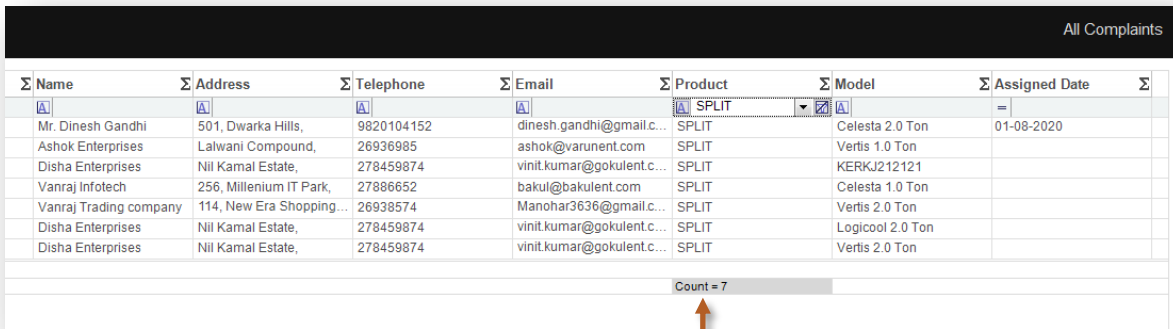
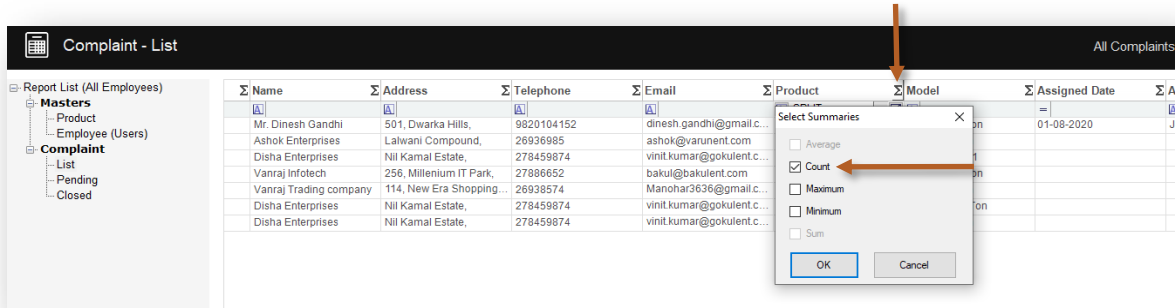


Click on Aggregate

Formula option added

Name	Address	Telephone	Email	Product	Model	Assigned Date	At
Mr. Dinesh Gandhi	501, Dwarka Hills,	9820104152	dinesh.gandhi@gmail...	SPLIT	Celesta 2.0 Ton	01-08-2020	Jc
Ashok Enterprises	Lalwani Compound,	26936985	ashok@varunent.com	SPLIT	Vertis 1.0 Ton		
Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	KERKJ212121		
Vanraj Infotech	256, Millenium IT Park,	27886652	bakul@bakulent.com	SPLIT	Celesta 1.0 Ton		
Vanraj Trading company	114, New Era Shopping...	26938574	Manohar3636@gmail.c...	SPLIT	Vertis 2.0 Ton		
Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Logicc 2.0 Ton		
Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Vertis 2.0 Ton		

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

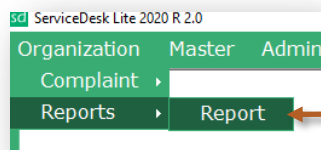


Count of Product

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

Complaint No	Date	Name	Address	Telephone	Email	Product	Model
1	01-07-2020	Mr. Dinesh Gandhi	501, Dwarka Hills,	9820104152	dinesh.gandhi@gmail.c...	SPLIT	Celesta
2	02-07-2020	Ashok Enterprises	Lalwani Compound,	26936985	ashok@varunent.com	SPLIT	Vertis 1
3	03-07-2020	Millenium Zerox	112, Gurukrupa Avenue,	9823568956	navin5478@yahoo.com	Window	Vectra
4	05-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	KERKJ;
5	07-07-2020	Vanraj Infotech	256, Millenium IT Park,	27888652	bakul@bakulent.com	SPLIT	Celesta
6	09-07-2020	Nitin Verma	201, Siddhi Avenue,	9821548798	nitin547@gmail.com	Window	Optima
7	11-07-2020	Maitihili Bangera	605, Everest Apartment,	8775698569	maitihili58@rediffmail.com	Ducted	
8	12-07-2020	Vanraj Trading company	114, New Era Shopping...	26938574	Manohar3636@gmail.c...	SPLIT	Vertis 2
9	14-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Logicoc
10	15-07-2020	Dilip Zaveri	112, Piramal Industrial...	9920415241	dilip96@yahoo.com	Window	Logicoc
11	17-07-2020	Disha Enterprises	Nii Kamal Estate,	278459874	vinit.kumar@gokulent.c...	SPLIT	Vertis 2

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

Organization-Reports List

Masters

1 Product
You will get the list of all the Products with following fields.
Name, code, Price & Description

2 Employee (Users)
You will get the list of all the Employees with following fields.
Name, Address, Telephone, Email & Login Name

Complaint

3 List
You will get the list of Complaints for all the Service Executives with following fields.
Complaint No., Date, Name, Address, Telephone, Email, Product, Model, Assigned Date, Assigned To, closed Date, Closed By, Complaint Details & Closed Notes

4 Pending
You will get the list of pending Complaints for all the Service Executives with following fields.
Complaint No., Date, Name, Address, Telephone, Email, Product, Model, Assigned Date, Assigned To & Complaint Details

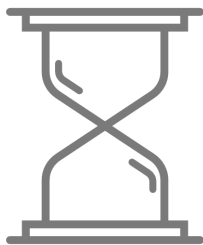
5 Closed
You will get the list of Complaints which are closed with following fields.
Complaint No., Date, Name, Address, Telephone, Email, Product, Model, Assigned Date, Assigned To, Closed Date, Closed By, Complaint Details & Closed Notes

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