questico.site

Service Complaints & Job Cards

User manual

Inside your tool it is called “Sahayak”.

A complaint desk and field-service tool for repair and appliance businesses: log every complaint as a ticket, give it to a technician with a visit slot, and close it with a job card.

1. Your tool at a glance

Sahayak logs each customer complaint with the customer's and appliance's details, flags repeat complaints and AMC customers, and assigns a technician to a date and time slot while a clock tracks the promised fix time (SLA) for each priority. Technicians work their day on the phone and close jobs with work done, parts, charges (with optional GST), payment and a customer rating. The owner sees how many jobs were fixed on time, the repeat rate and each technician's figures.

Made for: Appliance service and repair businesses with a complaints desk and a team of field technicians. The sample business is an AC service company in Velachery, Chennai.

Who can do what

Your tool has 3 role profiles. Everyone signs in with their own email address and sees only what their role allows.

Role	Usually	Can	Cannot
Owner	The owner of the service business	• Do everything the desk can • Give a person access from Sahayak's Team screen: saving them sends the invitation to their email address • Remove a person's access by unticking Active	• Change the access of their own row on the Team screen
Manager (the desk)	Complaint desk or service coordinator staff	• See and work on every ticket • Assign technicians and schedule visits • Set any status, including desk-only ones such as Closed • Delete tickets and customers • Download tickets, customers and the ticket register • Open the Team and Reports screens	• Give new people access; only the owner's save sends the invitation
Technician	Field technicians who visit customers	• Log complaints and see all tickets • Move the status, edit the complaint and resolve only their own or unassigned tickets • Take an unassigned job and change the visit on their own jobs • Add and edit customers	• Set desk-only statuses (Closed, by default) • Work on tickets assigned to another technician • Delete customers or tickets • Download spreadsheets, or open the Team or Reports screens

What staff can do in each list

These rules are kept by Questico's database, not only by the screens: a staff member who finds a way past a screen is still refused. They are for staff: owners and managers are not held to them.

Team

- Staff see every entry.
- Staff can't add entries.
- Staff can't change entries.
- Staff can't delete entries.

Customers

- Staff see every entry.
- Staff can add entries.
- Staff can change any entry.
- Staff can't delete entries.
- Once saved, staff can never change the AMC end date.

Complaints (tickets)

- Staff see every entry.
- Staff can add entries.
- Staff can change only their own entries.
- Staff can't delete entries.
- An entry is a staff member's own when they are the assigned technician.
- An entry with no technician yet can be picked up by any staff member.
- Once saved, staff can never change the ticket number, its place in the series, when it was raised, who raised it and the customer it belongs to.
- Staff may add to the history, never rewrite or remove what is there.
- Staff can never close a complaint; the desk or a manager does that.

2. Getting started

Ready when you buy

- Your business name (and its short form) is set from checkout, and your contact details replace the demo's.
- The demo business is gone: its people, customers, vendors and figures are not in your copy. City and address start empty for you to fill in.
- Lists such as departments start with a common set; change them to match your business in the admin panel.
- Your GSTIN from checkout is already in your settings.

Where your tool lives

- Your tool has its own address, such as yourbusiness.questico.site. Open it on a phone or a computer.
- You can also open it from your Questico account: Your space → Paid, or your console, where the tool shows three buttons: Open the tool, Edit website (the admin panel) and Team.

Signing in: there are no passwords

- Everyone opens your tool’s address and presses Sign in, then signs in with the email you added for them, in one of two ways.
- With Google: press “Continue with Google”. For a Gmail address, or a work email that is a Google account (Google Workspace). Google looks after the password and security.
- With any other email (Outlook, Zoho, your company’s own mail): under “No Google account? Use any email”, type the address and press “Email me a code”. Questico emails a 6-digit code; type it in and you are in. The code works once and expires soon.
- Someone who signs in but has not been added sees “You’re signed in, but not invited yet” until you add their address.

Adding your team

1. One person at a time: inside the tool, open Team and add their name and email address, and choose Technician or Manager. Saving gives them access and puts them on the tool’s own list.
2. Everyone at once: in your Questico console, open the tool’s Team section → Add many from Excel. Download the template, fill one row per person (name, email, access, and if you like mobile, department, designation and joining date), and upload it. You see every row checked before anything is added. Uploaded people get access and appear on the tool’s own list too.

3. Your whole company, for all your tools: Your space → Your company team. Upload your staff sheet once (name, email, employee ID, department, designation, function, mobile, joining date, access, and Active or Left), then press Apply beside each business tool. New people get access and appear on the tool's own lists. Applying never changes the access someone already has in a tool. To take someone off, mark them Left: the next Apply removes their access, and their past records stay. Someone simply missing from a new sheet is not treated as having left.

Partners as owners

- If you run the business with partners, make them owners too: in your console, the tool's overview has an Owners card. Type a partner's email and press Add an owner. Up to five owners in all.
- They become owners the next time they sign in to Questico with that email, and can then do everything you can: the admin panel, the team, and asking for changes. The tool shows in their own Your space under Sites you co-own.
- Any owner can remove a co-owner, and a co-owner can leave. The person who bought the tool always stays an owner.

Sending the invitation, and seeing who has joined

- Questico emails each person an invitation as soon as you add them, however you add them: one at a time, from Excel, or from your company team. It tells them your tool's address and how to sign in, with Google or with a code.
- In the console's Team section, "Remind the N not signed in" emails everyone who has not joined yet. Under "Send the invitation" you can also copy the ready message for your team's WhatsApp group.
- The same page counts who has joined and who has not signed in yet, lists everyone with the date they were invited and the date they joined, and downloads the list for Excel.
- To change someone's access or remove them, use the tool's Team screen or the console's Team section. Their past records stay.

The emails Questico sends your team

Questico tells people when something needs them, by email from notices@questico.site, so nobody has to keep the tool open to find out.

Within a few minutes

- The technician it is assigned to: "Complaint [no] is assigned to you: [customer], [area]."

Every morning at 8

- Owners and managers: "N open complaints with no technician"
- The technician it is assigned to: "N open complaints assigned to you"

Several things at once come as one email, never a flood. Each email says what happened and links to your tool. Anyone can stop them: the link at the foot of each email stops that business's notices for that person, and the same link turns them back on. Invitations and sign-in codes still arrive.

Changing your settings

In your console, press Edit website to open your tool's admin panel. Change the name, logo, colours, words, pictures, lists and rules; every change shows in a live preview first. Records (the day-to-day entries) are made inside the tool itself.

Everyday features

- On a phone the menu moves to a bar at the bottom, and tables turn into cards.
- Anything printable opens your browser's print window, where you can also choose "Save as PDF".
- Lists and reports download as CSV files that open in Excel.
- WhatsApp messages open ready-written; you press send. Nothing is sent automatically.

3. Your first day

1. Before buying, try the demo with sample data and switch View as between owner, desk and technician to see each screen
2. Open the admin panel from Edit website in the Questico console; every change shows in a live preview
3. Enter the business name, address, desk name and logo, and pick the colours
4. Set the priorities with their fix-within hours and the default; set the ticket prefix and the repeat window
5. Define the ticket statuses (stage and desk-only) and decide whether to ask for ratings
6. Fit the complaint categories, appliances, capacities, sources, areas and visit slots to your trade
7. Enter the rate card for services and parts; add your GSTIN and GST rate if registered
8. Edit the three WhatsApp messages and the job card terms
9. Fill in the welcome texts, technician rules, sign-in texts, pictures and contact
10. Add your team: in the Questico console's Team section, type each person's email address and choose 'Can use it' (technician) or 'Can manage it' (desk); or add them on Sahayak's Team screen, where the owner's save sends the invitation
11. Ask each person to sign in with that email address (with Google, or a code Questico emails them)
12. Start logging complaints; customers are created as tickets are logged, or can be added by hand

4. Everything it does

Today (owner and desk)

- Show a headline with open complaints, how many are past the promised time, and visits booked today
- Start a new ticket or open today's schedule in one tap
- Show figures for Open tickets (and how many are not assigned), Past the SLA (with the oldest lateness), Resolved today (and how many came in), and Average fix time (with % within the SLA)
- List what needs attention: late, unassigned, or due within 3 hours
- Chart complaints in and fixed over the last 14 days
- Show each technician's load: open jobs, today's visits done, and late
- Show what customers call about in a chart

Today (technician)

- Jump to the next customer, or log a complaint
- Show figures for Visits today done out of total, My open jobs (past the SLA), Fixed this month (SLA %) and Customer rating over 30 days
- Show today's visits as job cards: slot, status, SLA, customer, address and landmark, complaint and unit, and a repeat flag
- Call the customer, send 'On my way' on WhatsApp, open the map, move to the next status or Resolve, and open the job card when done
- List other open jobs and the rules the owner has written for technicians

Tickets (everyone)

- Show a badge: the desk sees late plus unassigned tickets, technicians see their own open jobs
- Switch between Mine, Open, Late, Not assigned, Waiting, Done and All
- Filter by technician, priority and complaint, and search
- Show a list (first 150) with ticket and repeat flag, complaint and unit, area, technician and visit, status and SLA
- Show a board with a lane per status plus 'Fixed, last 3 days', and change status from each card
- Download tickets as a spreadsheet (desk)
- Start a new ticket

New ticket (everyone)

- Find a past customer by mobile or name, or enter mobile, name, area, landmark and address
- Pick one of the customer's saved appliances, or add another with appliance, capacity, where it is, and make and model
- Enter the complaint category, priority (showing its fix-within hours), what the customer says and how it came in
- Choose the technician (technicians default to themselves; the desk defaults to 'Assign later'), visit date and time slot
- Warn if the customer already has an open ticket, if it is a repeat complaint, or if the customer has an active AMC
- Create or update the customer record on saving, adding any new appliance to it

Ticket page (everyone; desk-only steps for owner and desk)

- Call, WhatsApp (visit booked message, or resolved message when done), open the map, or open the job card
- Move the ticket through its status steps; desk-only steps are greyed out for technicians
- Show the SLA line
- Edit the complaint: category, priority, issue and appliance details
- Assign or change the technician, visit date and slot; a new ticket with a technician and date moves to the next open status
- Send the visit time or 'On my way' to the customer on WhatsApp
- Let a technician take an unassigned job
- Resolve the job: what was done (required), the done status, how it was paid (Cash, UPI, Card, Not paid yet or No charge), work and parts from the rate card or another item with quantity and rate, and the customer's star rating if the owner turns it on
- Show the customer card with earlier tickets and a link to their history
- Show a history timeline and add a note
- Delete a ticket (desk only)

Schedule (everyone)

- Move day by day
- Show a column per technician with each time slot showing the job or 'Free'; the technician's own column comes first
- List tickets waiting for a visit (no technician or no date), most urgent first, with a Schedule button for the desk

Customers (everyone; delete and download for the desk)

- Search customers and see name and mobile, appliances, AMC (till date or expired), ticket count and last complaint
- Download customers as a spreadsheet (desk)
- Add a customer
- Open a customer to see tickets in 6 months (and open now), repeat complaints, amount paid to you and AMC
- Call, WhatsApp, edit or start a new ticket from the customer page
- Edit a customer: name, mobile, area, landmark, address, AMC valid till, notes, and the units at the address (appliance, capacity, where)
- Delete a customer (desk only); their past tickets stay

Team (owner and desk)

- Chart jobs fixed in the last 30 days, within the SLA and late
- List each person's access (Owner, desk, Technician, Invited, Inactive), open and late, fixed, average time, within-SLA %, rating, repeats and amount billed
- Add or edit a person: full name, email address, mobile, what they are good at, access (Technician: own jobs, can log complaints; or Desk: every ticket, assigns jobs, reports) and Active

Reports (owner and desk)

- Move between months and download the ticket register (20 columns)
- Show complaints (fixed and open), within the SLA (and average fix time), customer rating, and repeat complaints %
- Chart complaints in and fixed each day, and amount billed split into work, parts and GST
- Show tables by complaint (fixed late, repeats), by priority (average fix, within SLA) and by technician (fixed, average, SLA, rating, repeats, billed)
- Show where complaints come from, by area

5. Reports, prints and downloads

Prints

- Job card, printed or saved as PDF: letterhead (with GSTIN if set), ticket number, logged, visit and resolved times
- Customer and address, appliance and make, technician, complaint and work done
- Lines of work and parts, tax rows, total, amount in words, payment received and mode
- Terms, with 'Not a tax invoice.' when no GSTIN is set
- Signature lines for the customer and the technician

Downloads

- Tickets (desk; 20 columns)
- Customers (desk)
- Monthly ticket register

WhatsApp

- Visit booked message to the customer
- Technician on the way message

- Job resolved message asking for a rating
- Messages can use {name} {no} {business} {tech} {date} {slot} {amount}
- WhatsApp opens with the message ready; the user presses send

Worked out for you

- SLA due time = time logged + the priority's fix-within hours (plain calendar hours)
- Pills showing 'Due in X', 'Overdue X' or 'Fixed in X'; the SLA is met when the job is resolved by the due time
- Average fix time
- A new complaint from the same customer within the repeat window after their last fix is marked a repeat
- Line = quantity × rate, with a subtotal
- GST at the owner's rate, only when a GSTIN is entered, printed as CGST and SGST halves
- Total and amount in words
- Ticket numbers run like PREFIX-YYMM-001

6. What you can change in the admin panel

No coding: every change shows in a live preview, and saving updates your live tool.

Business & look

- Change the name, short name and city
- Enter the address printed on job cards
- Name the complaints desk (for example 'Service desk')
- Upload the logo
- Choose the main colour, sidebar style (Light, Deep or Tinted), one of 8 typefaces, and corners (Soft, Round or Sharp)

Priorities & SLA

- Set 1 to 6 priorities, each with a name, code, fix-within hours (1 to 720) and colour
- Choose the priority a new ticket starts with
- Set the ticket number prefix
- Set the repeat window: a complaint is a repeat if it comes back within 1 to 180 days

Ticket steps

- Set 2 to 10 statuses, each with a name, code, meaning (New, Being handled, Waiting, Done), colour, and whether only the desk can set it
- Ask for the customer's rating when a job is resolved, or not

Complaints & appliances

- Edit the kinds of complaint, appliances, capacities, how complaints come in, areas served, and visit time slots in day order

Rate card & GST

- Enter up to 60 services and up to 80 parts, each with a name and rate
- Enter your GSTIN, which turns GST on and prints on job cards
- Set the GST rate on repair (%)

WhatsApp & job card

- Write the visit booked, technician on the way, and job resolved (asking for a rating) messages
- Write the job card terms

Words & pictures

- Write the desk welcome, technician welcome and the rules shown to technicians
- Write the sign-in heading, text and quote
- Change the three pictures; they are shrunk automatically on upload

Contact

- Enter the contact email and WhatsApp

Checks the panel makes

- Priority codes must be unique and the default priority must exist
- Status codes must be unique
- There must be at least one 'New' status
- There must be at least one 'Done' status that technicians can set

7. Good to know

- It does not keep spare-parts stock or inventory
- There is no customer self-service portal; ratings are entered by staff
- AMC is only a 'valid till' date: no AMC billing or renewal reminders
- The SLA counts plain calendar hours, without business hours or holidays
- Payment modes when resolving a job are fixed: Cash, UPI, Card, Not paid yet and No charge
- GST is only CGST plus SGST; there is no IGST option
- Ticket lists cover the last 3 months; the customer page covers 6 months
- The Closed and desk-only status rules are applied by the tool's screens
- WhatsApp opens with the message ready; nothing is sent automatically
- A person who signs in without being invited sees 'You're signed in, but not invited yet'

Need help?

Write to contact@questico.site with your tool’s address and what you need.