Light Desk

USER GUIDE

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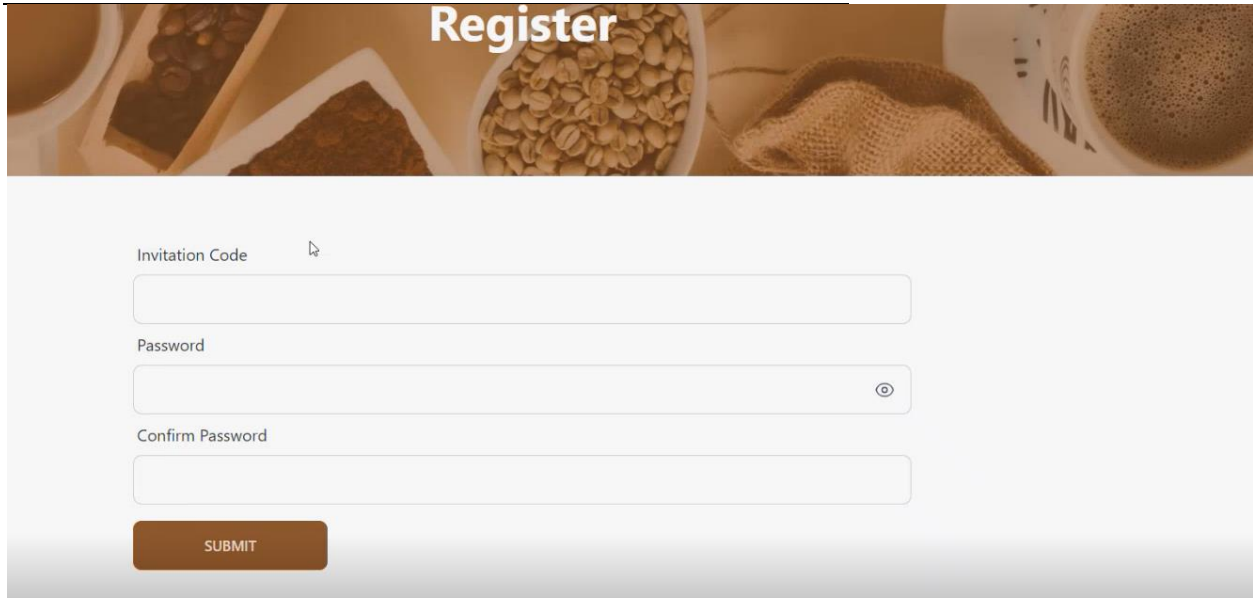# Table of Contents

LIGHTDESK

1.Getting Started

Registering an Account

Once you are on the registration page, locate the "**Register**" button.
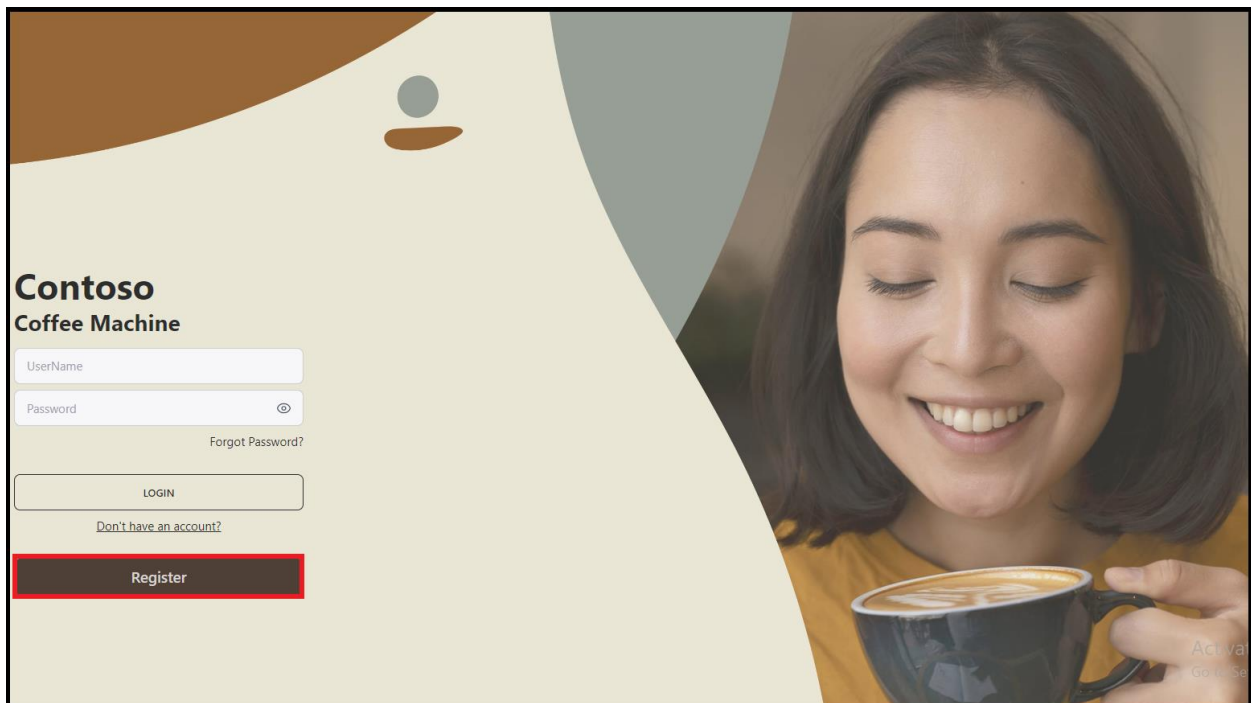
After clicking the "**Register**" button, the website will process your request and redirect you to the registration form page.

If you have not registered, the administrator will generate a contact and dispatch an invitation. The recipient will then be sent an email containing a link. Upon clicking the link, they will be directed to a page where they must input the invitation code, set a password, confirm it, and click the "submit" button. This action will finalize the process, providing you with the necessary username and password for accessing the portal.
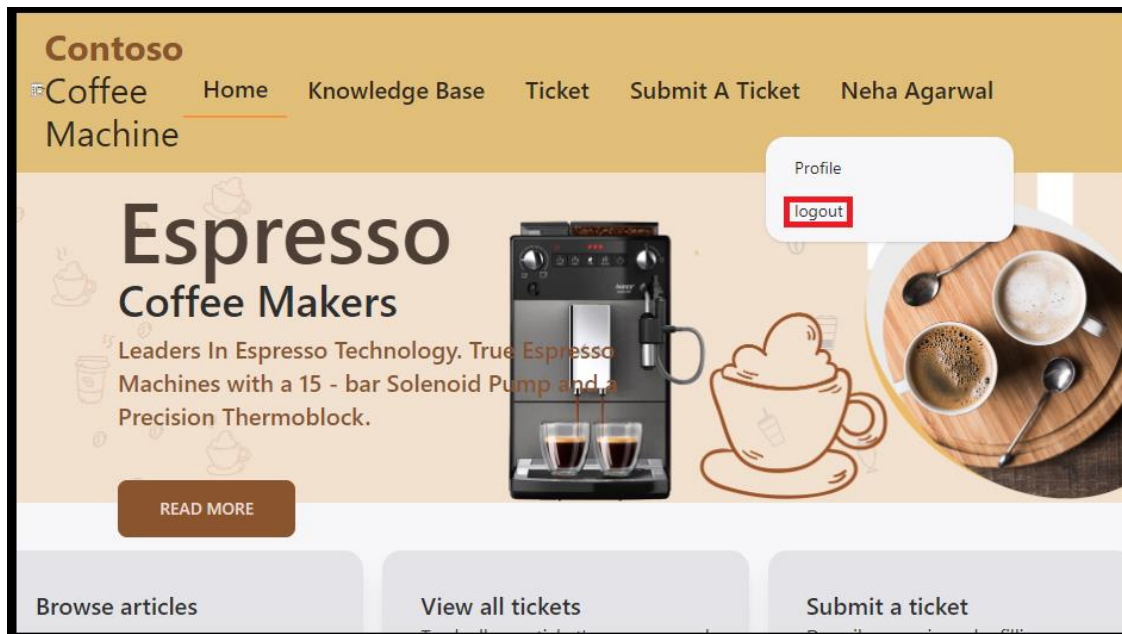
Logging In and Out

LOGIN

Please enter your username and password to access the Light desk.

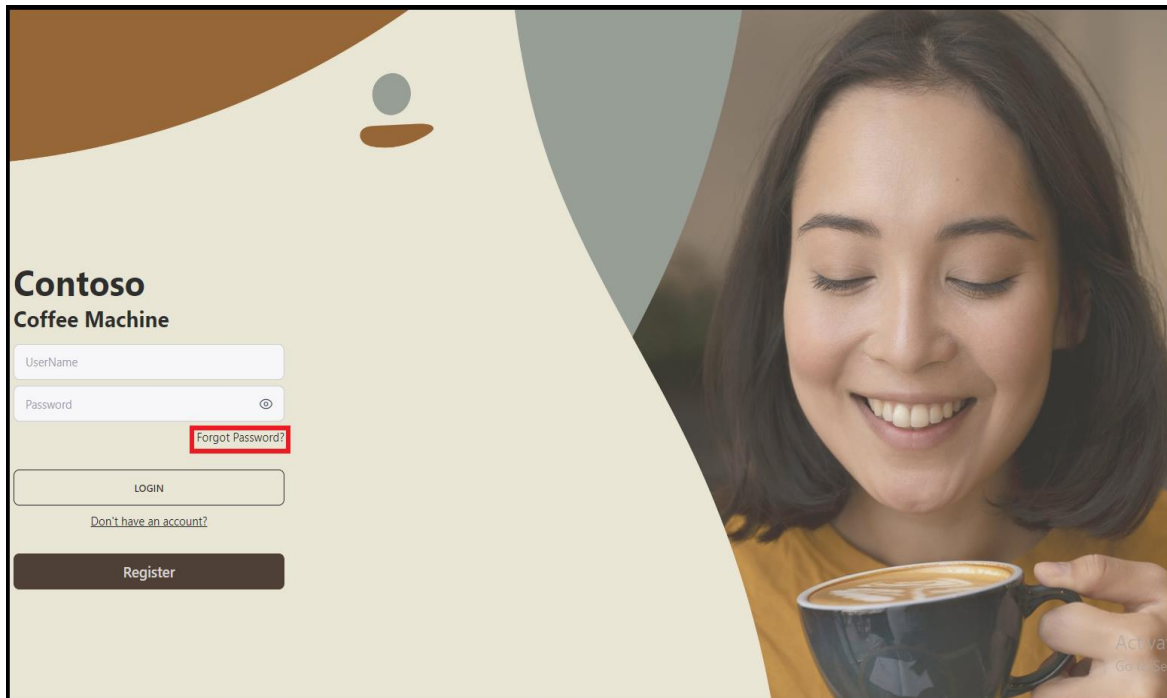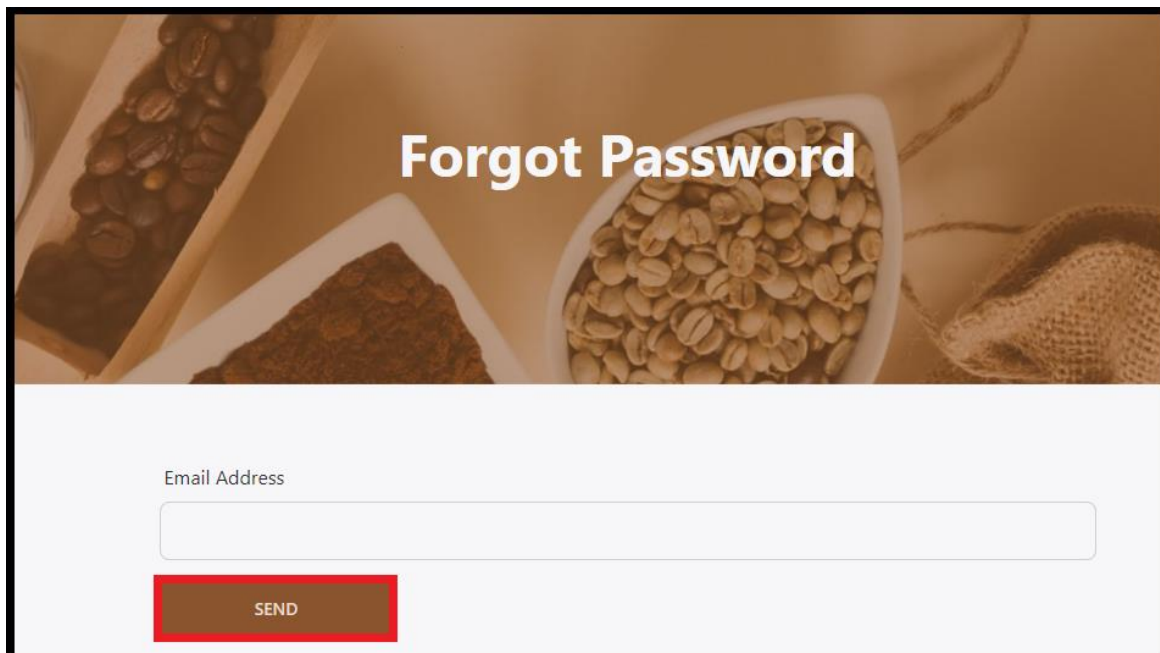**Copyright © 2012 Management Technology Consulting LLC**
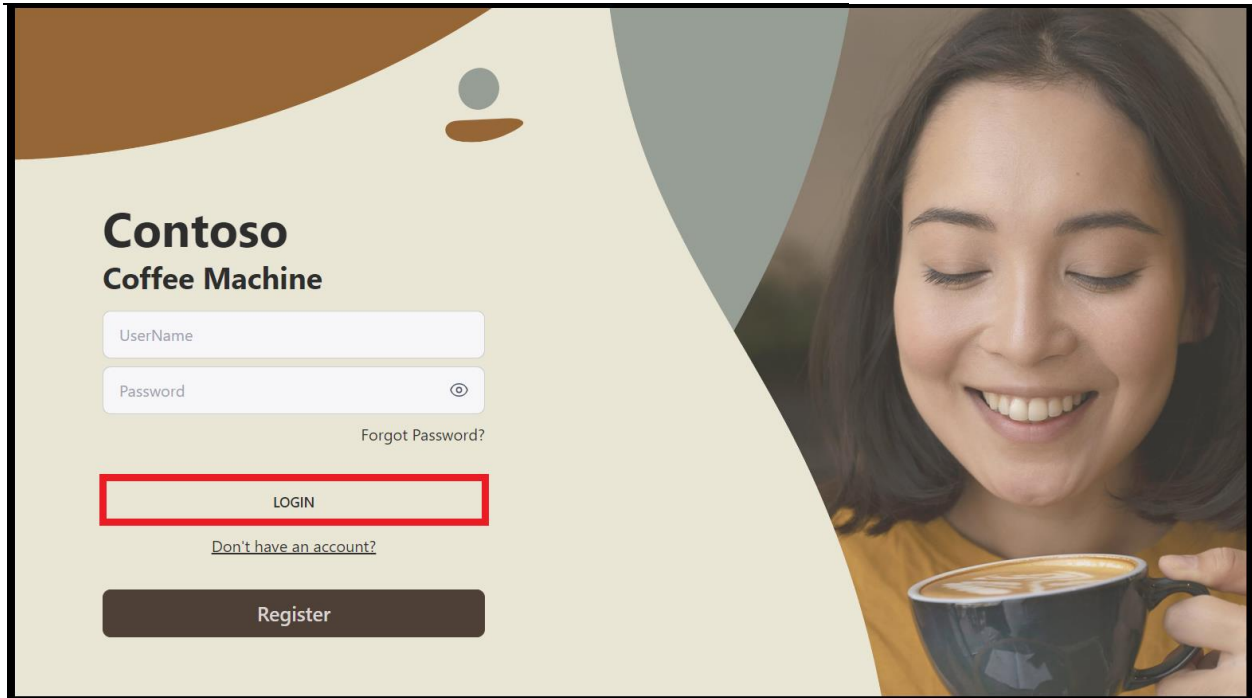
LOGOUT

To log out of your account, you can do so easily by clicking on the '**Logout**' button located at the top of your screen.

Forgot Password Recovery

Clicking on the '**Forgot Password**' button will redirect you to the Forgot Password page.

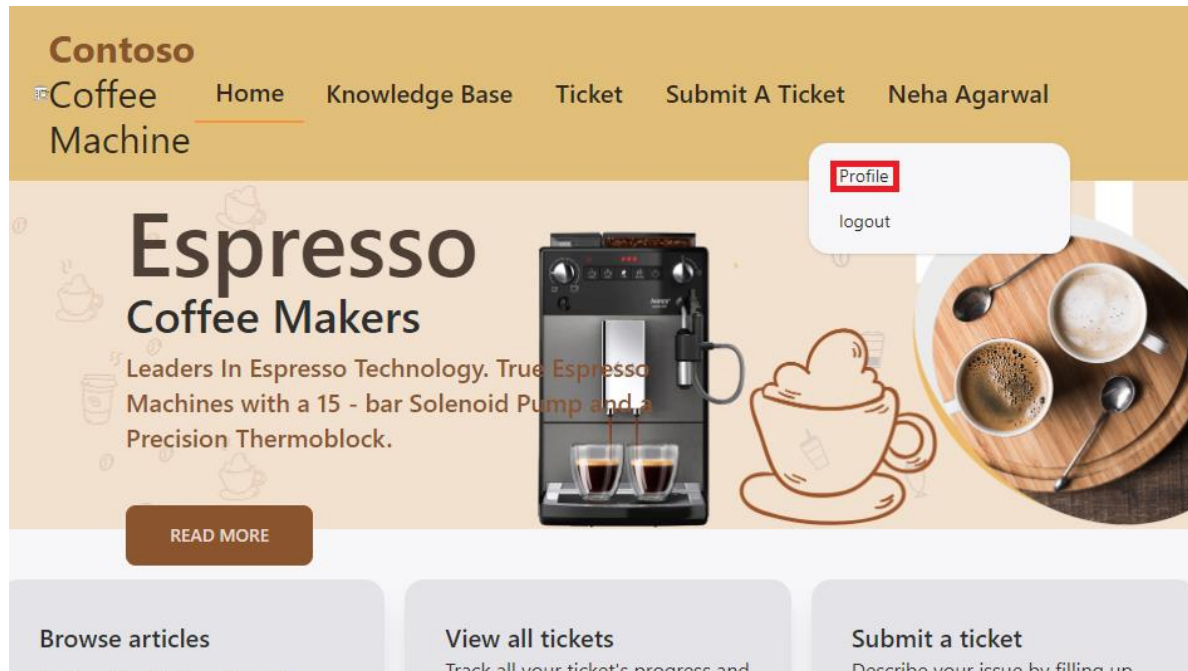**Copyright © 2012 Management Technology Consulting LLC**

To restore account access, please enter your email on the **'Forgot Password**' page under '**Email Address**' and click '**Send**'.
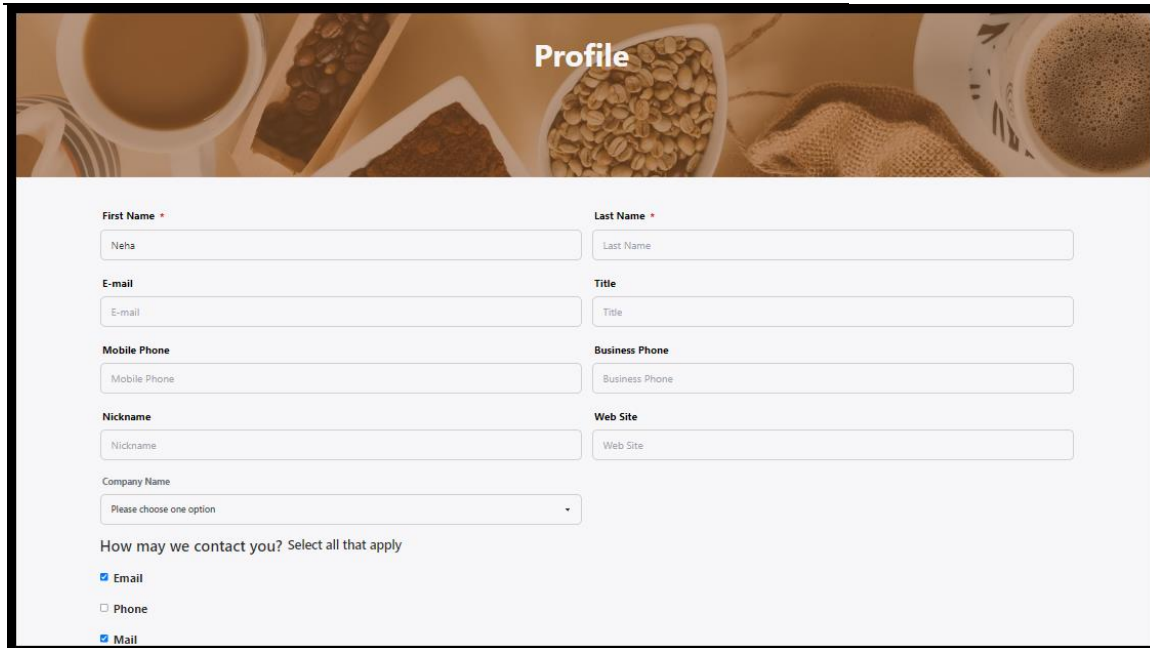
2. Managing Profiles

Creating a User Profile

After logging in, click on **'Profile.'**

Clicking on the '**Profile**' button will redirect you to the profile page.

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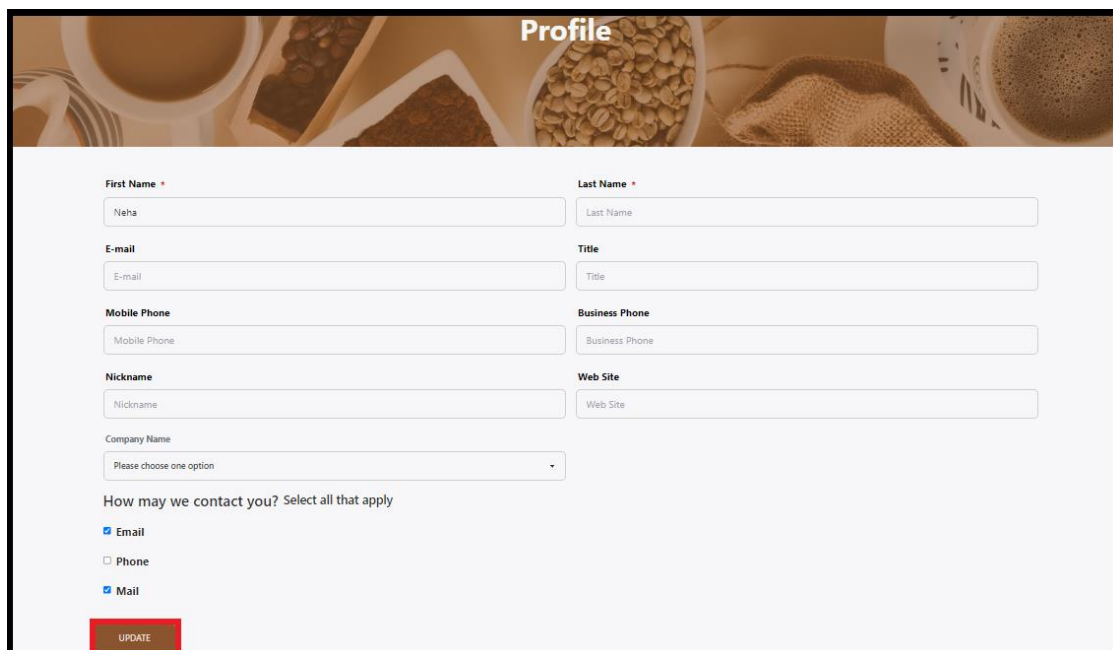
Please ensure that you provide information for all the required fields. These fields include your **First Name**, **Last Name**, **E-mail address**, **Title**, **Mobile Phone number, Business Phone number**, **Nickname, Website**, and **Company Name**.

Additionally, there is an option to specify your preferred mode of communication. You can do this by checking the appropriate box for **Email**, **Phone**, or **Mail**. This selection will help us understand how you would like to be contacted for any relevant communications or updates.

Updating User Profiles

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Updating Your Profile Information: A Step-by-Step Guide

STEP 1:

Start by navigating to your profile page. You can do this by clicking the "Profile" button at the top of your screen.

Step2:

Once on the profile page, modify various fields according to your requirements. These fields encompass essential details such as your **First Name**, **Last Name**, **E-mail address**, **Title**, **Mobile Phone number**, **Business Phone number**, **Nickname**, **Website**, and **Company Name**.

Step3:

After making the necessary updates, take a moment to review all the changes you have made. Ensure that the information is accurate and up to date.

Step4:

When you are confident with your edits, proceed to locate the "**Update**" button. Clicking on this button will set in motion the process of saving and applying the modifications you have made to your profile.

Following these steps, your profile will reflect the most current and accurate information. Always remember to double-check your updates before finalizing them by clicking the "**Update**" button.
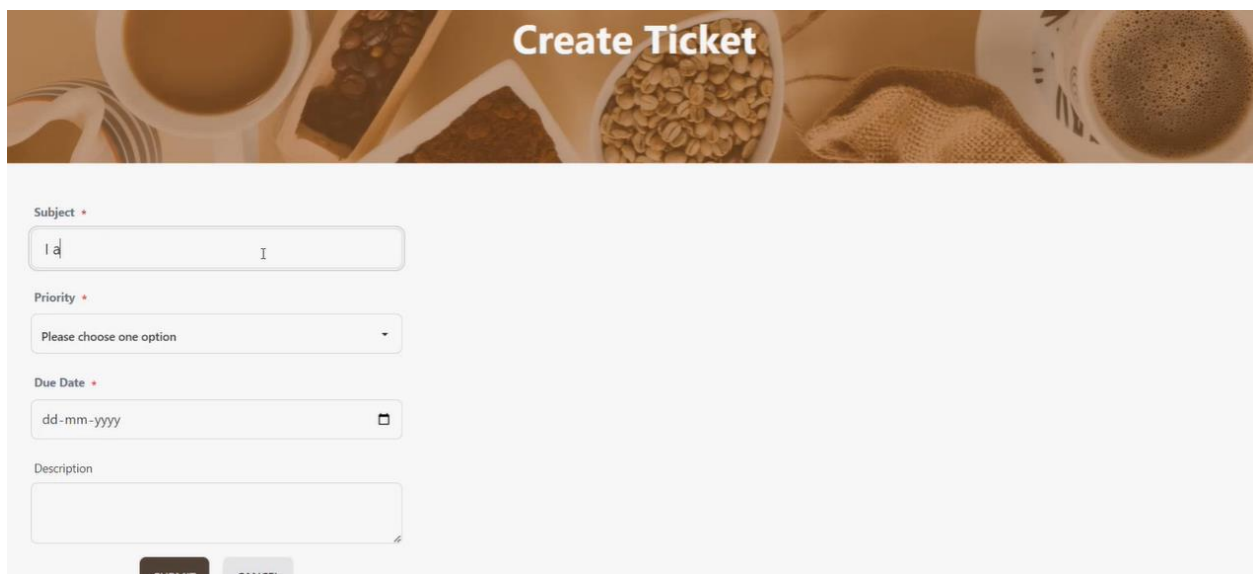
3.Ticket Submission Process

Submitting Tickets
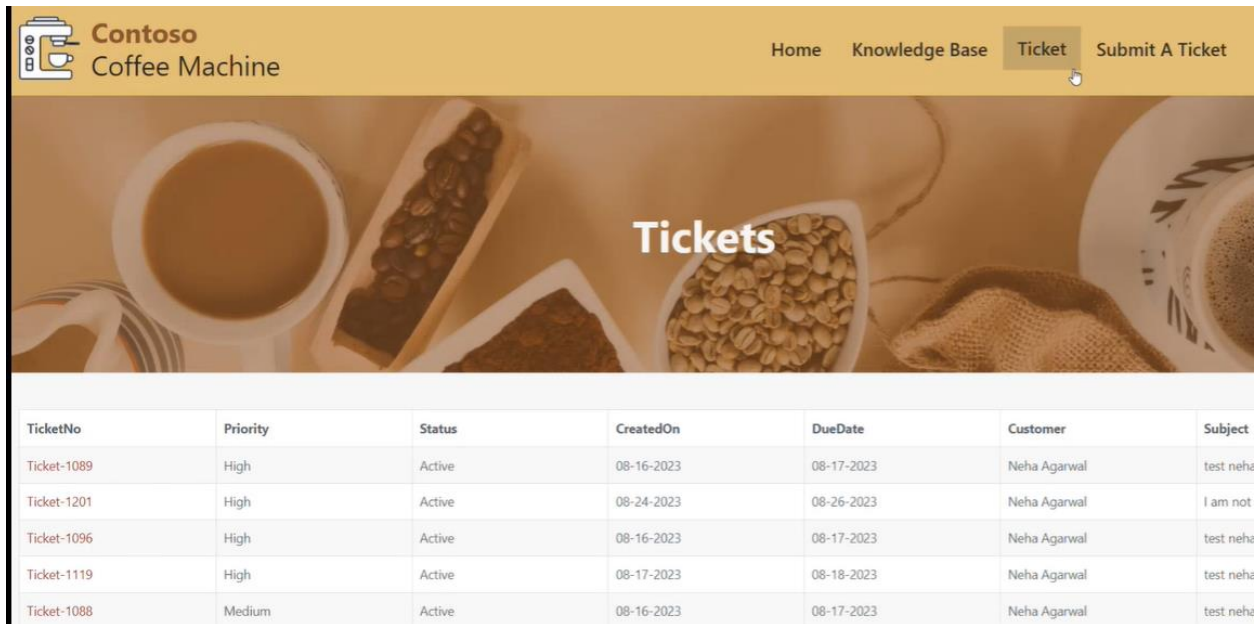
To raise a ticket, click on **'Submit a Ticket'**.
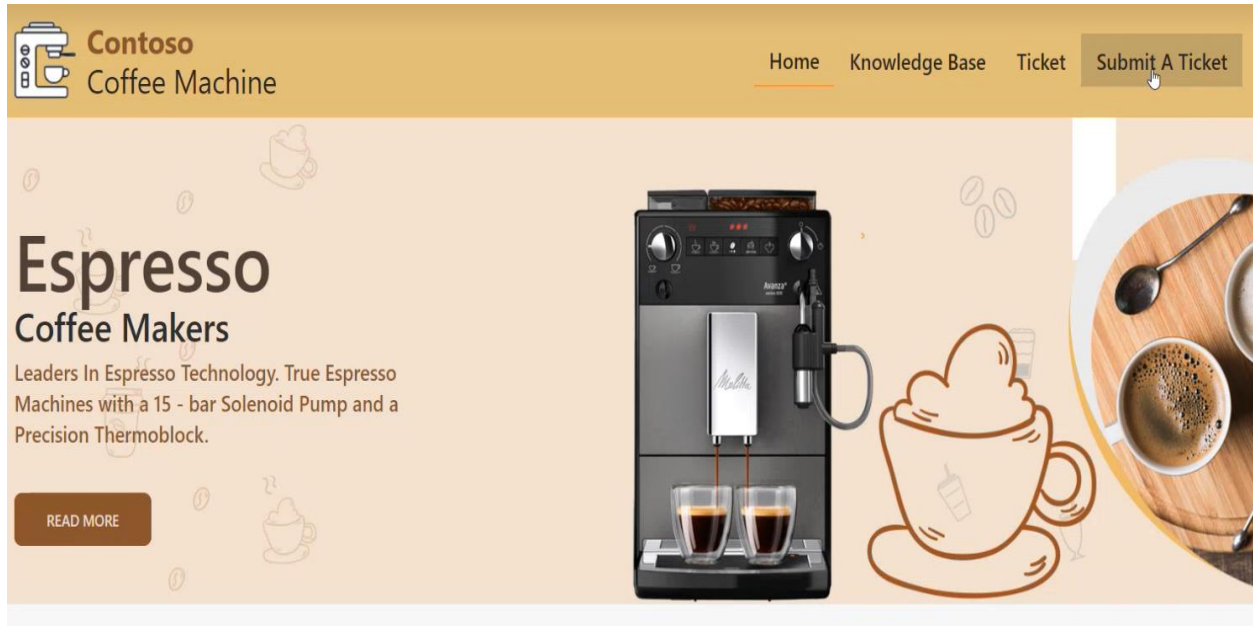
You will be directed to the page where you can create a new ticket.

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Kindly ensure that you provide accurate information for each of the required fields. These essential fields comprise the **Subject**, **Priority** (which can be set as Low, Medium, High, or Urgent), **Due Date**, and **Description**. Once you fill in these details, click the "Submit" button.

After you click the "Submit" button, the system will initiate a ticket creation within the CRM (Customer Relationship Management). You will be taken to a ticket page that shows all the tickets raised by the user.

If you wish to review a specific ticket, simply click on it, and you will be directed to the details page.

Apply any required modifications if needed, and then select the "**Update**" option.

4.Using the System

Sarrthy Login Instructions

Please enter your username and password to access the **SARRTHY**.
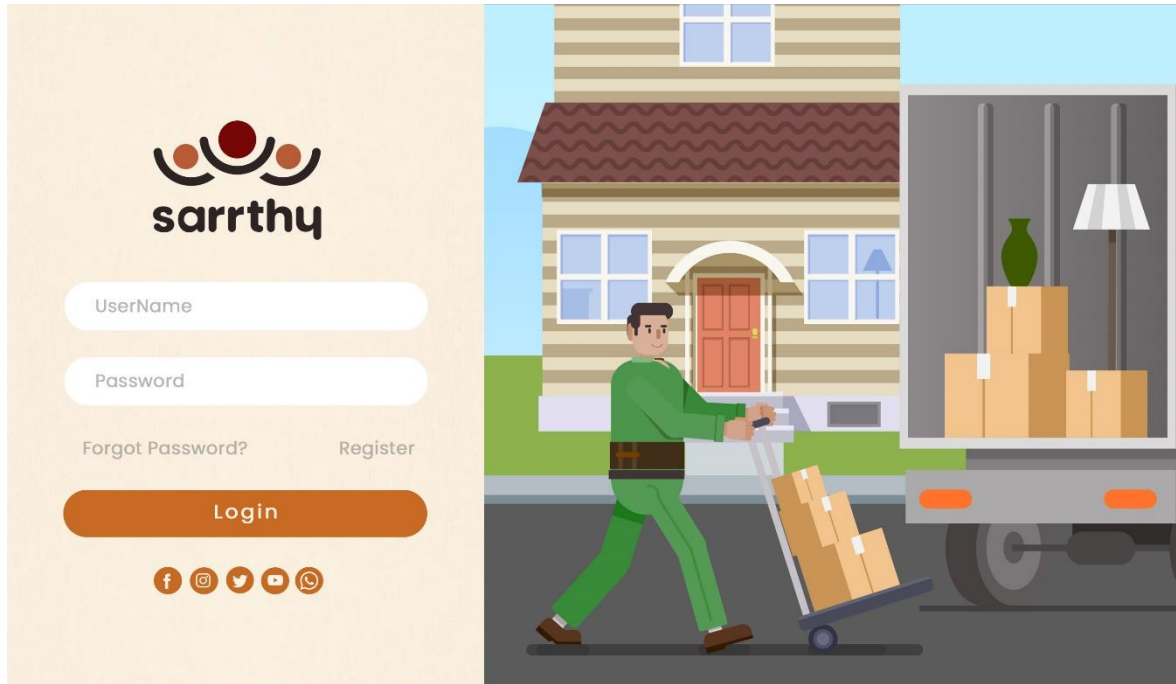
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Customer On Boarding

Please make sure to fill in all the necessary fields, including First Name, Last Name, Phone Number, and Email Address. **First Name**, **Last Name**, **Phone Number**, **Email Address**, you also have the option to check "**I am not a robot**" checkbox.

The "**Submit**" button will become accessible only after you have checked the "**I am not a robot**" box. Click this "**Submit**" button to proceed.

Sarrthy users utilize Custom entities, whereas Light Desk employs System entities. In the scenario of Customer Onboarding, a System entity is generated for recording purposes. This involves the creation of a Contact within the Contact System entity. Following this step, the Sarrthy team needs to replicate this Contact into the custom entity.

Additionally, there is a **Customer** (Portal) lookup field that requires mapping. We need to map in both Contact System and Contact Custom. These tasks are successfully completed, and order creation will be initiated through Portal.

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5.Managing Orders

Creating New Orders

Please enter the **Item Name**, **Quantity**, and **Units of Measurement**, and then click on "**Add Item,"**

You will be able to view the details provided at the bottom of the page.

For editing, locate the item you wish to modify, click on the "**Edit**" option, make your changes, and save them. To delete, find the item and select the "**Delete**" option.

Item Name	Quantity	Units of Measurement	Edit/ Delete
Banana	1000 Pcs	100	✏️ 🗑️
vegetables	10 boxses	15	✏️ 🗑️

Tracking Order

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Locate the "**Track Order**" section you will then see **Order ID**, **Item Name**, **Order Date**, **Request Type**, and **Status Reason**, helping you monitor your order's progress and status effectively. If you have any questions, reach out to customer support for assistance.