



SPINSO[®]



Standard edition

QuotationTracker

create professional quotation



Getting Started (Trial Edition)

Quick start guide for QuotationTracker Standard Edition

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Getting Started Guide

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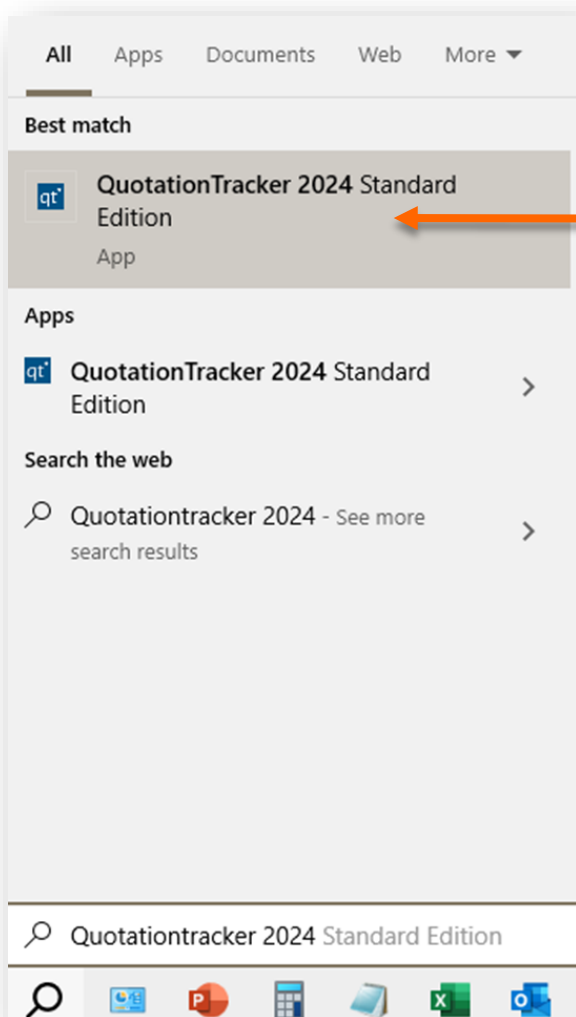
2

LOGIN



Double Click on **QuotationTracker** icon, on your desktop.

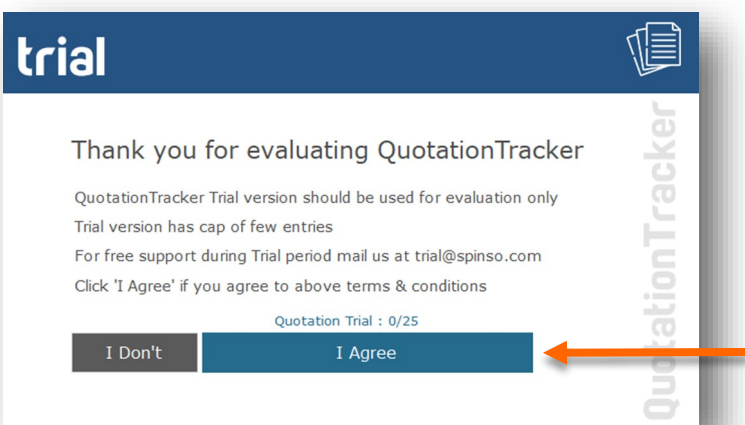
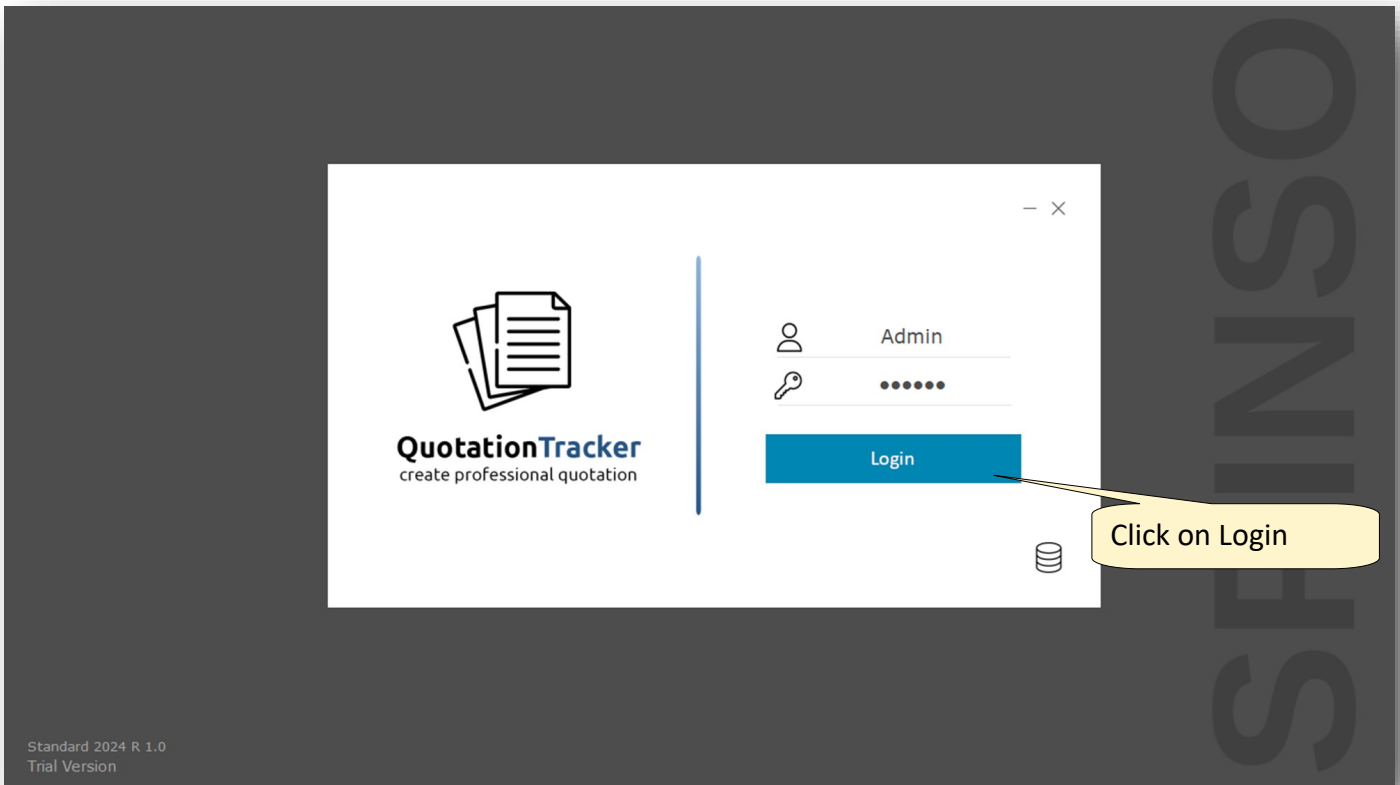
or



You can also launch the application from **Start - Program Files - Spinso - QuotationTracker**

Default login details:

- User Name : **admin**
- Password : **spinso**

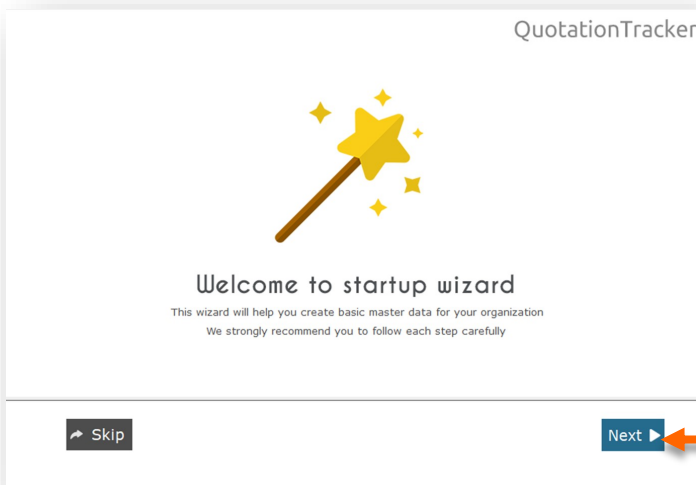


Click on **I Agree**

3

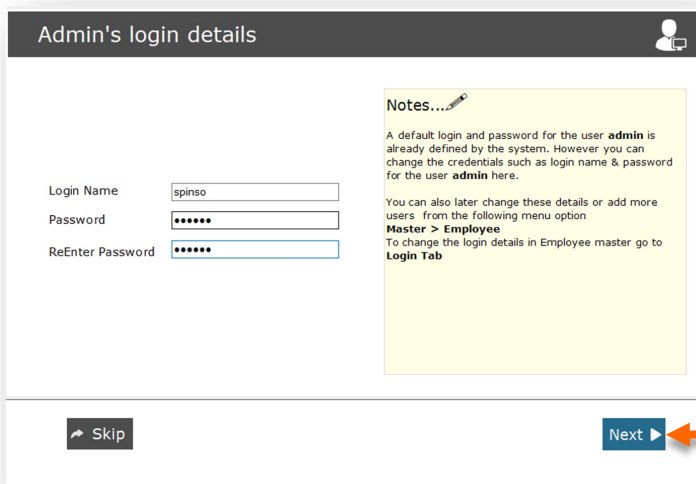
WIZARD

- The wizard screen lets you quickly enter basic details required to create master's data like Employee, Product, etc. so that you can immediately start creating Quotations.
- This screen will appear only once when you login to the system for first time.
- Data entered through wizard can be seen in Master screen. You can also further add or modify these details later in the respective master's screens.
- Here we are using IT and Networking as an example for Business type. Kindly choose a Business type that is appropriate for your business.



1

Click on **Next**.

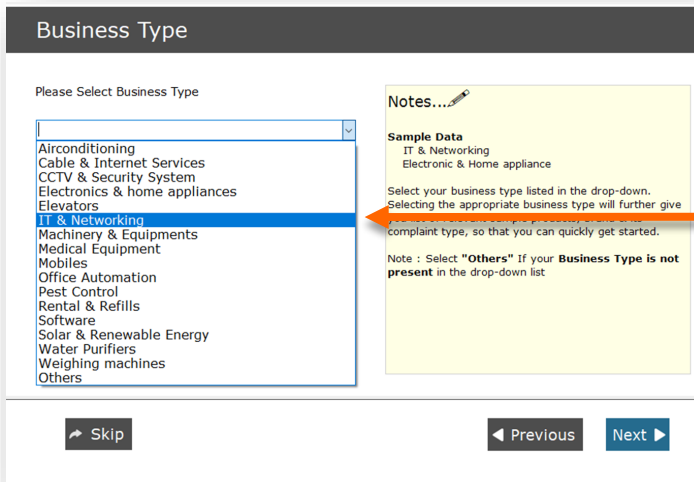


2

Here, change Admin's Login Name & Password.

The new login name & Password will be used for your next login. Hence, kindly keep a note of these details.

Click on **Next**.



Business Type

Please Select Business Type

- Airconditioning
- Cable & Internet Services
- CCTV & Security System
- Electronics & home appliances
- Elevators
- IT & Networking**
- Machinery & Equipments
- Medical Equipment
- Mobiles
- Office Automation
- Pest Control
- Rental & Refills
- Software
- Solar & Renewable Energy
- Water Purifiers
- Weighing machines
- Others

Notes...

Sample Data
IT & Networking
Electronic & Home appliance

Select your business type listed in the drop-down. Selecting the appropriate business type will further give complaint type, so that you can quickly get started.

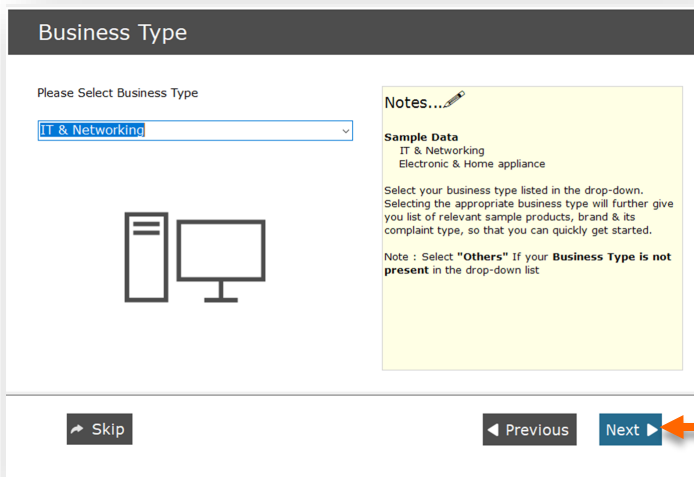
Note : Select "Others" if your **Business Type is not present** in the drop-down list

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3

Click on the list, then select your business type from the list.

Here as an example we are selecting IT and Networking. Kindly select a business type that is a best fit for your business.



Business Type

Please Select Business Type

IT & Networking

Notes...

Sample Data
IT & Networking
Electronic & Home appliance


Select your business type listed in the drop-down. Selecting the appropriate business type will further give you list of relevant sample products, brand & its complaint type, so that you can quickly get started.

Note : Select "Others" if your **Business Type is not present** in the drop-down list

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4

Click on **Next**.



Employee (users)

Please enter Employee Name

Riya DSouza
Neil Anderson
Mark Wilson

Notes...

Please enter your employee details first name & last name as given below
John Smith
Rita Singh

You need to enter each employee name in a new line

In the above example by default **login name** and **password** assigned to John Smith would be john & rita respectively. However you have the option to change the login and password later from menu option **Master > Employee**

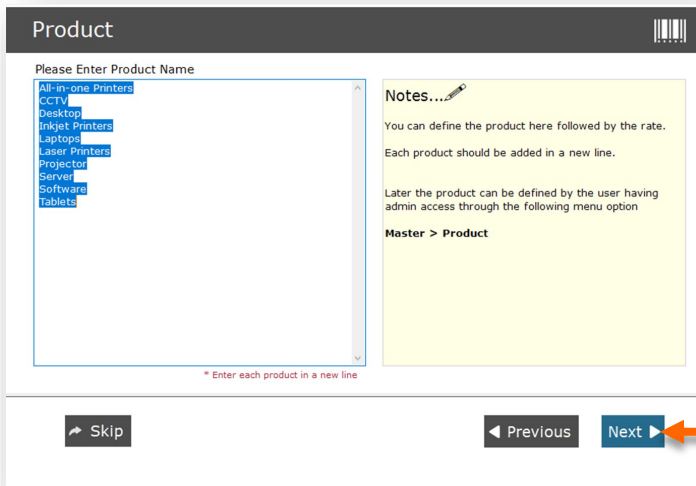
Note : By default **first name** would be used for Login and Password

* Enter each employee in a new line

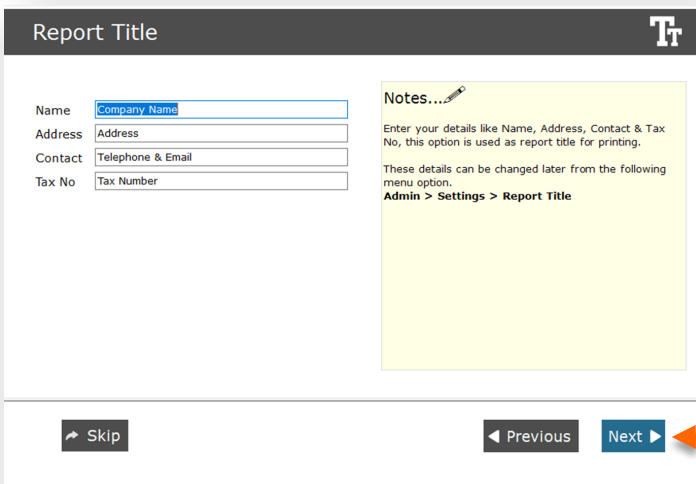
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5

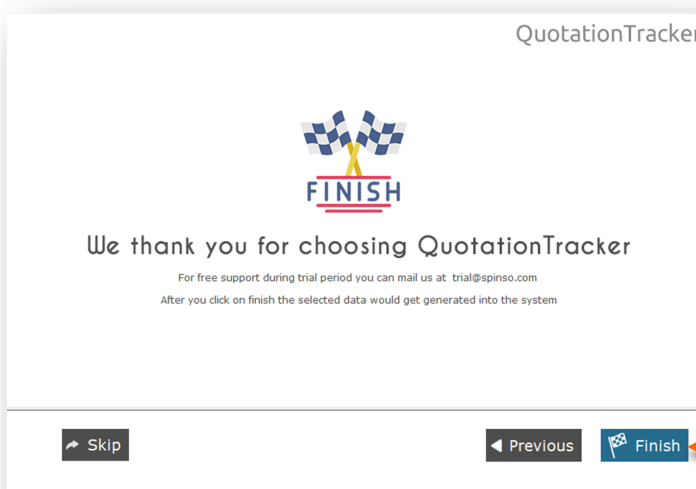
Enter employee name here, each name in a new line. Click on **Next**.



6 Enter Product here, each name in a new line. Click on **Next**.



7 Customize your Reports by entering Report Title here. Click on **Next**.



8 Click on **Finish**.

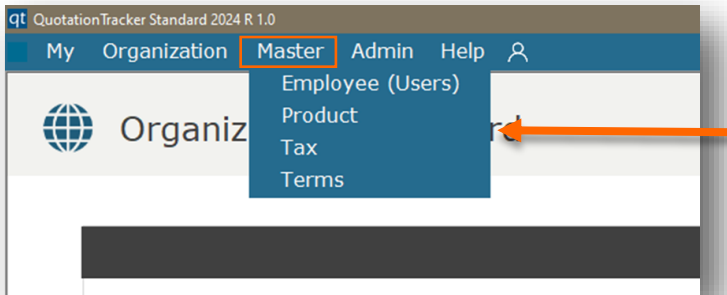


Wizard is completed

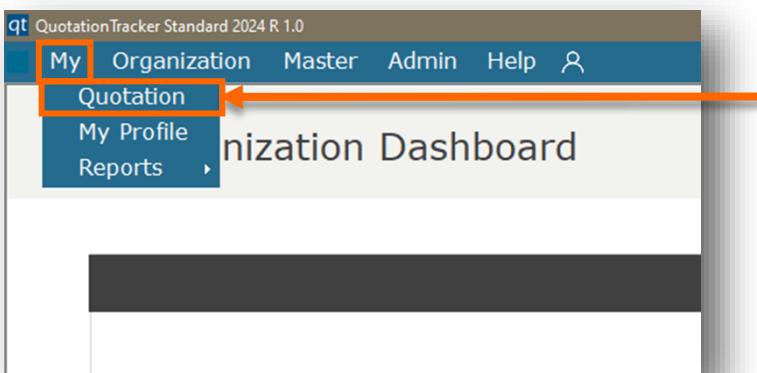
Next Step: To view the data entered in the wizard refer the following steps

Note: If you wish to change or update wizard.

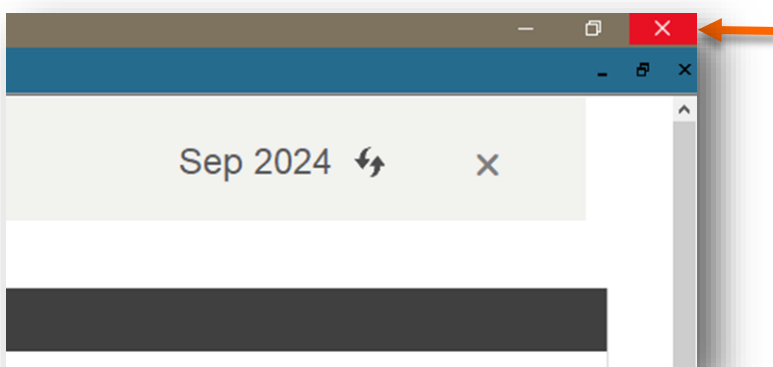
- **Master** → **Employee**; here you can add/edit employee's name or password.
- **Master** → **Product**; here you can add/edit Product's name or price, etc.
- **Master** → **Tax**; to add/edit tax with amount, percentage.
- **Master** → **Terms**; to enter terms and conditions.



You can immediately start creating Quotations from **My** → **Quotation**



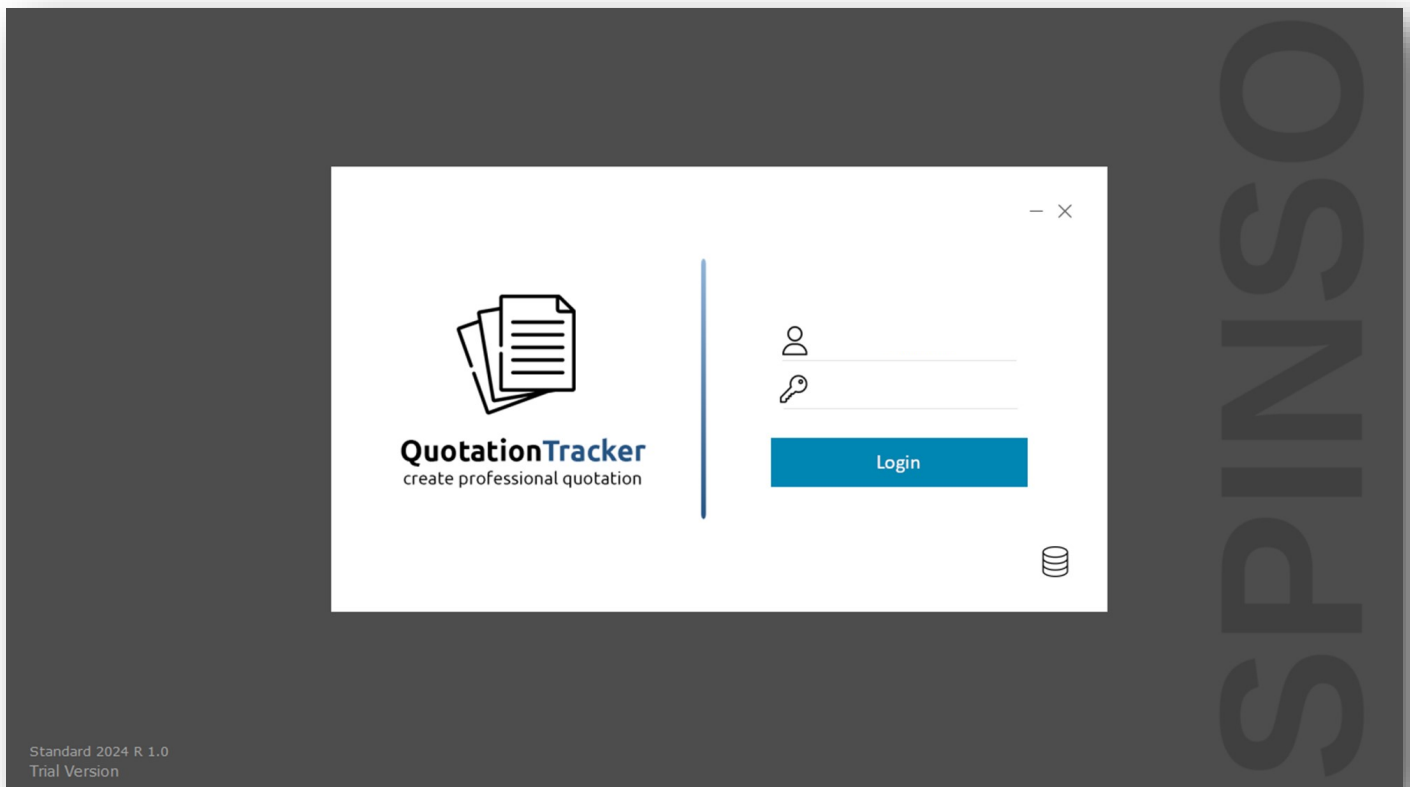
Click on this exit button to close the application.



4

Re-Login

The next time, you login to our system, enter your new login credentials.



Thank you

For more information

Kindly Call us or WhatsApp +91.99 201 401 00 for any queries.

For more info visit: spinso.com

Next step



First Quotation

how to quickly enter your first Quotation in QuotationTracker Standard
[QT STD Entering-Your-First-Quotation.pdf](#)

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Celebrating

25

years in business

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manage leads & follow-ups



ServiceDesk

manage warranties & AMC



ComplaintTracker

manage customer complaints



TimeTracker

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