



Basic edition

SalesTracker

manage leads & follow-ups



Entering your first Lead (Trial Edition)

Step by step guide on entering your first Lead in SalesTracker Basic.

1

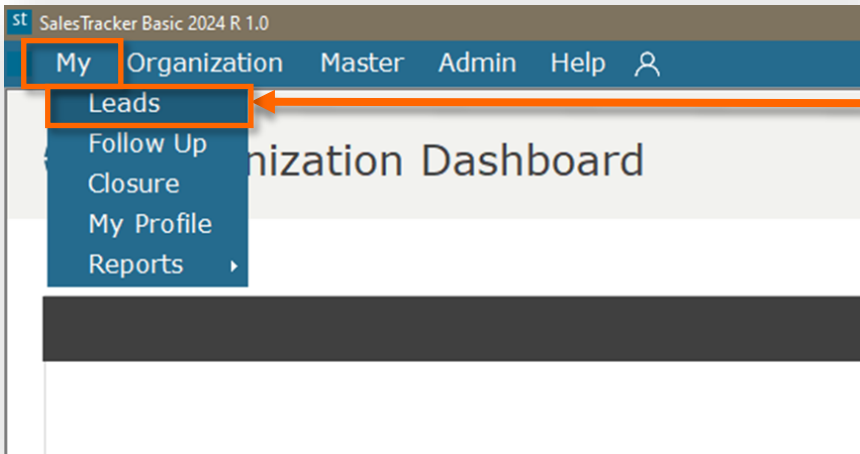
INDEX

Steps

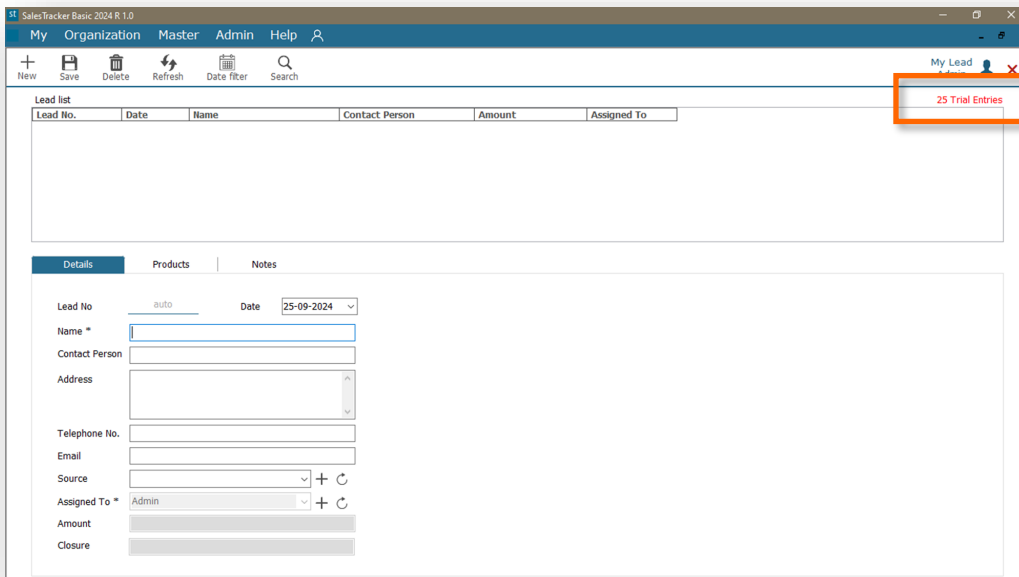
1. Index _____ Pg 2
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3

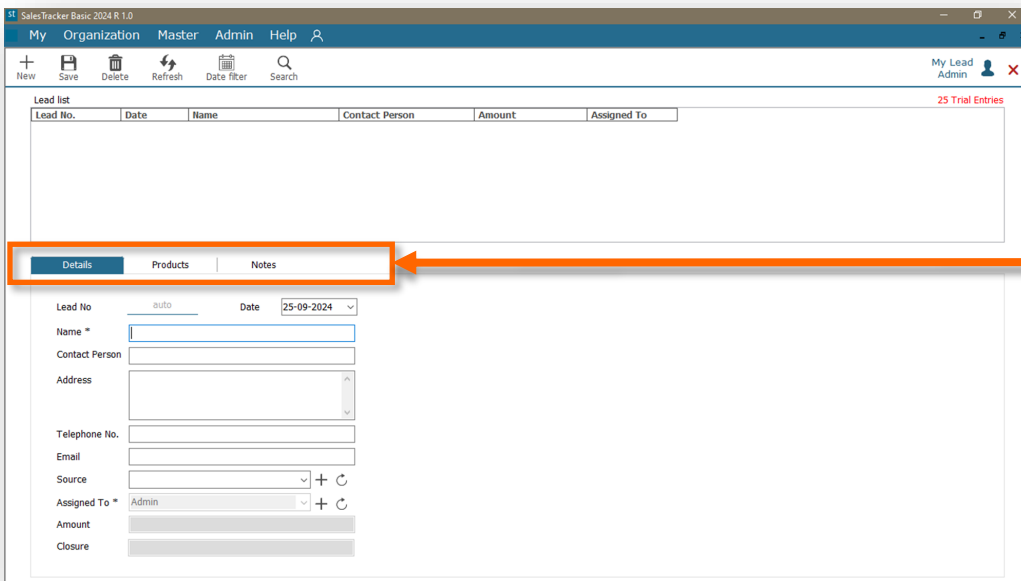
Entering your first Lead



Go to
My > Leads



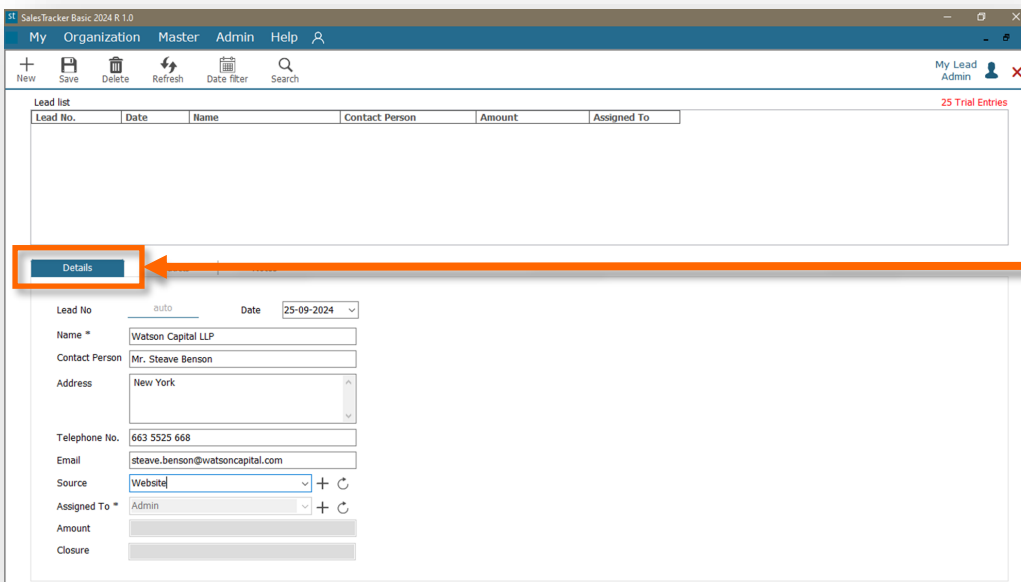
Please note: this is a trial edition, has a cap of 25 trial entries.



There are three tabs:

- **Details** : Lead details are filled here.
- **Products** : Product details are filed here.
- **Notes** : any notes or remarks are filled here.

Lets fill them one by one.

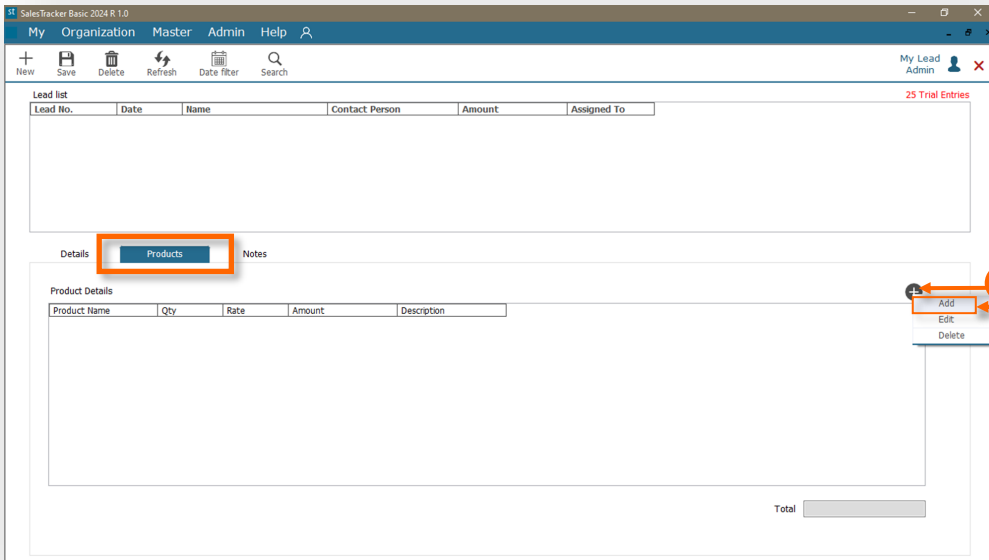


Fill in the Details:

- Enter name
- Contact Person
- Address
- Telephone No.
- Email
- Select Source

Note:

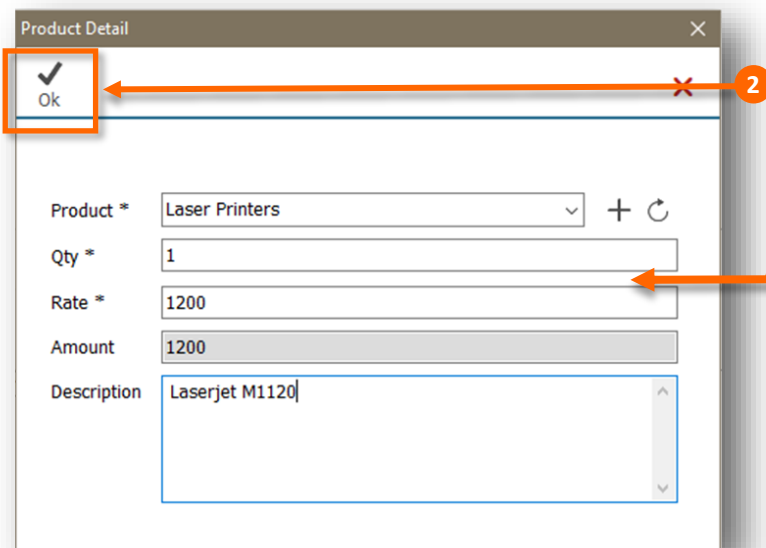
- For Assigned To, data will be auto selected by the login user name.
- Amount will be filled once product details are entered.
- Closure shows lead status that is open, lost, cancel or won.
- Lead No. will be auto generated by the system.



Products Tab:

1. Click on the Plus Icon
2. Select **Add**

Product details window will open

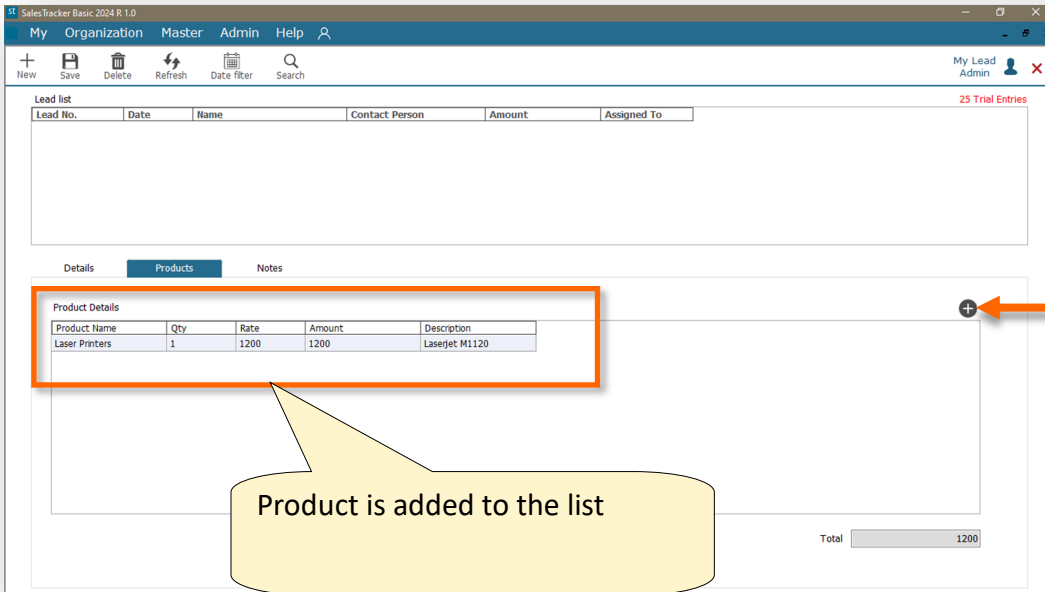


Product Details:

1. Enter product details

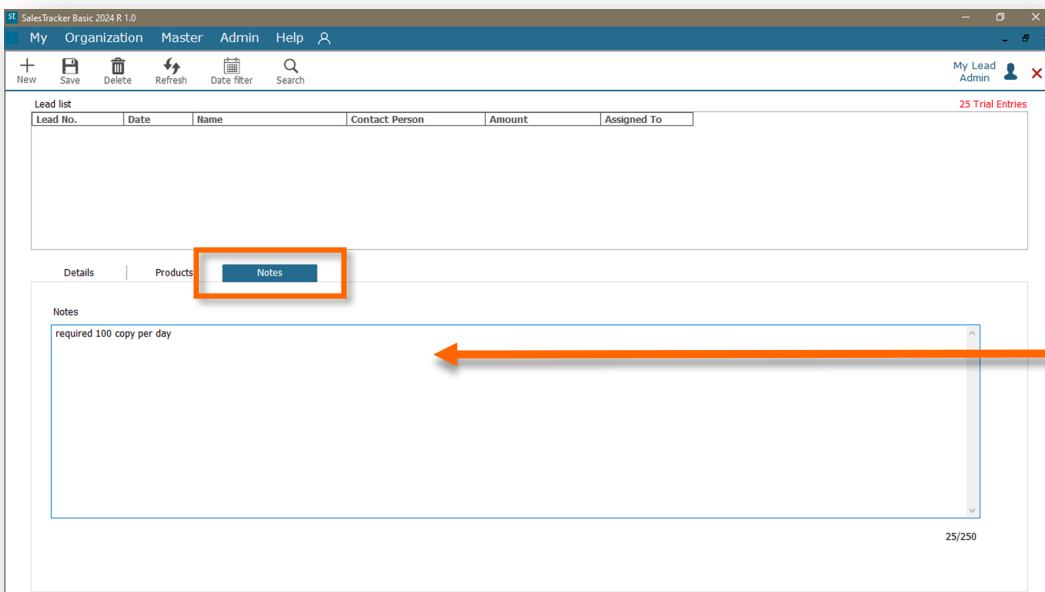
- Select Product
- Quantity
- Rate
- Amount will be auto calculated.
- Enter any notes or description

2. Click on **Ok** to save.



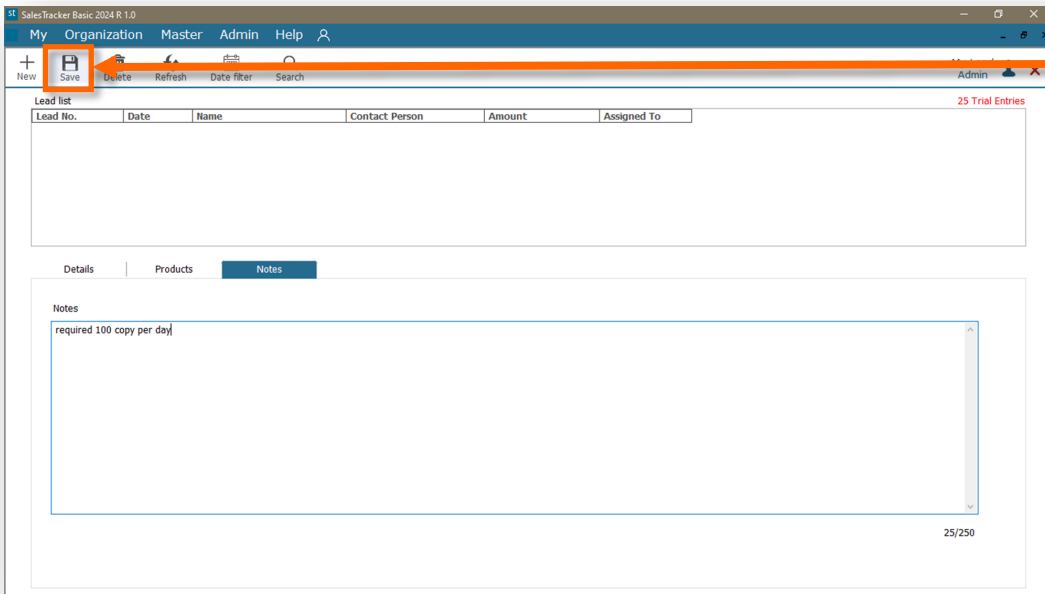
Product is added to the list

To add multiple Products click on the **plus** icon > Select **Add**. Repeat the same process.

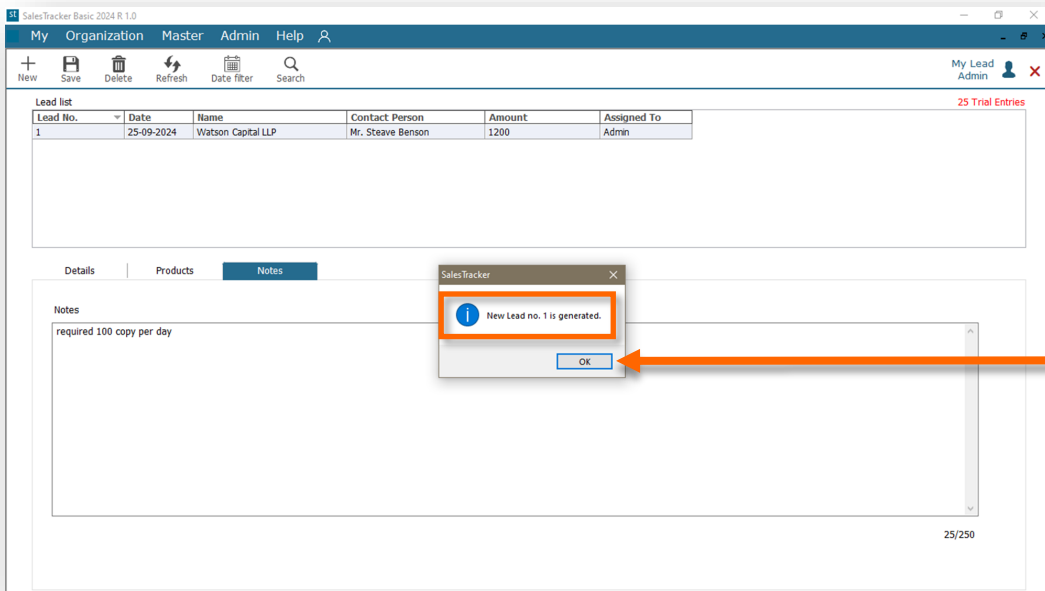


Notes Tab:

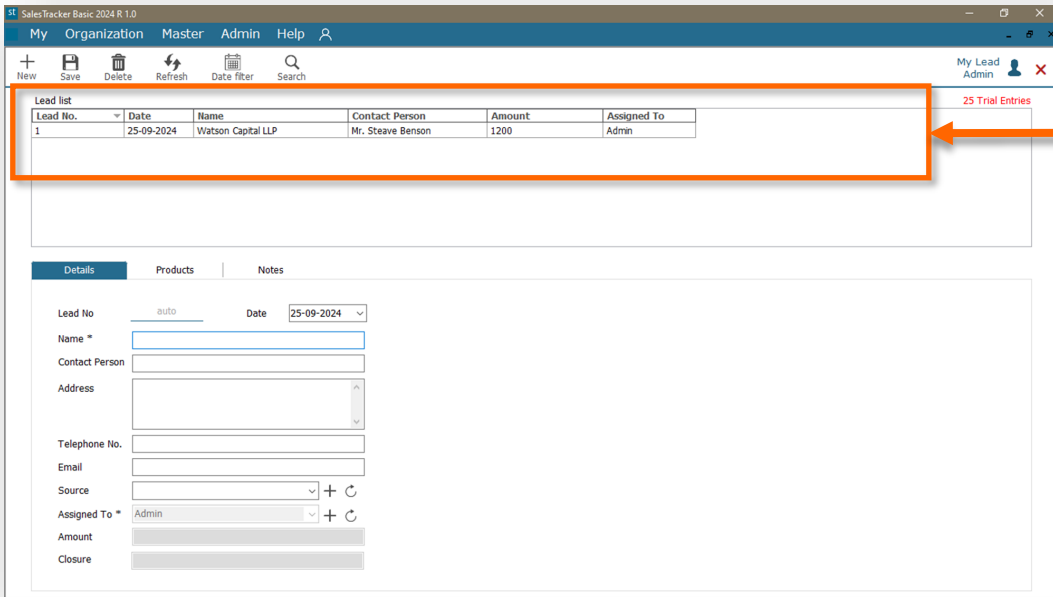
Enter any notes or Remarks here.



Click on **Save**.



Lead No. 1 will be generated.
Click on **Ok**.



The screenshot shows the SalesTracker Basic 2024 R. 1.0 application window. The top menu bar includes 'My', 'Organization', 'Master', 'Admin', and 'Help'. Below the menu is a toolbar with icons for 'New', 'Save', 'Delete', 'Refresh', 'Date filter', and 'Search'. The main area is divided into two sections: a 'Lead list' table and a 'Details' form.

The 'Lead list' table contains the following data:

Lead No.	Date	Name	Contact Person	Amount	Assigned To
1	25-09-2024	Watson Capital LLP	Mr. Steave Benson	1200	Admin

The 'Details' form below the table shows the following fields and values:

- Lead No: auto
- Date: 25-09-2024
- Name: [Empty field]
- Contact Person: [Empty field]
- Address: [Empty field]
- Telephone No.: [Empty field]
- Email: [Empty field]
- Source: [Empty dropdown]
- Assigned To: Admin
- Amount: [Empty field]
- Closure: [Empty field]

An orange arrow points from the text 'Lead record is saved..!' to the first row of the 'Lead list' table.

Lead record is saved..!



Congratulation

You have successfully entered lead details of your lead in Salestracker Basic.

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 Follow Up

step-by-step guide on how to register your first follow up in SalesTracker Basic

[ST Basic Entering-Your-First-Follow-Up.pdf](#)

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