SPINSO

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

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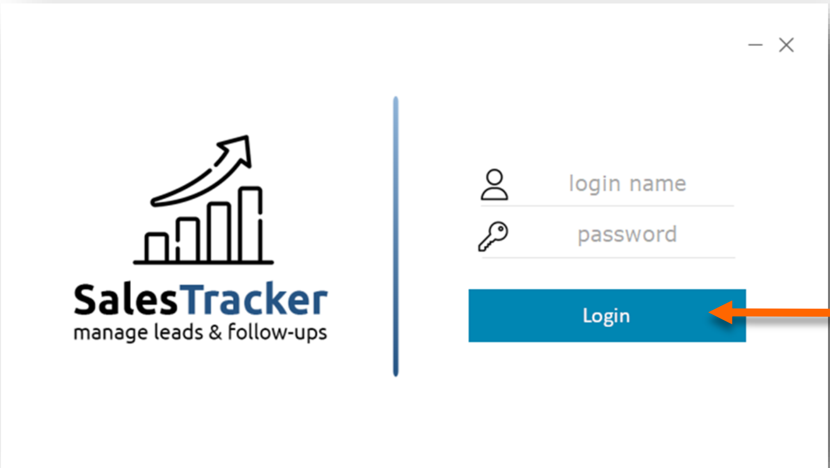
2 Login

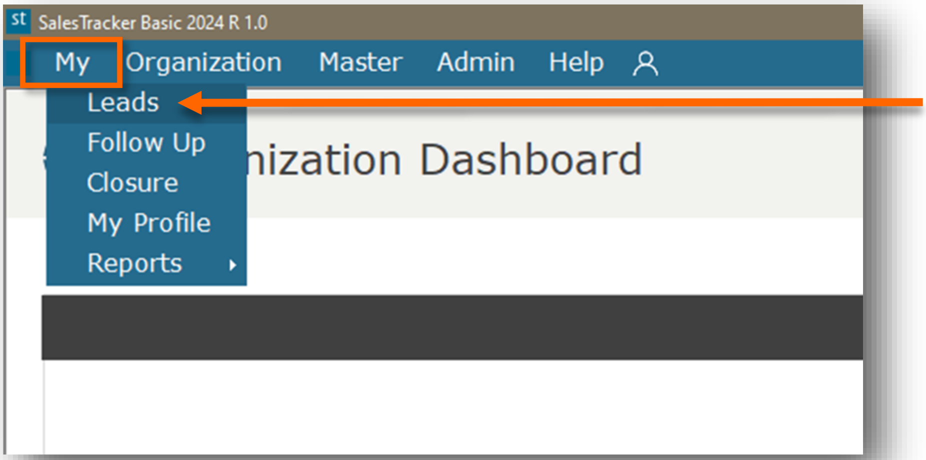
Start **SalesTracker.**



Enter Login name and password

Click on **Login**

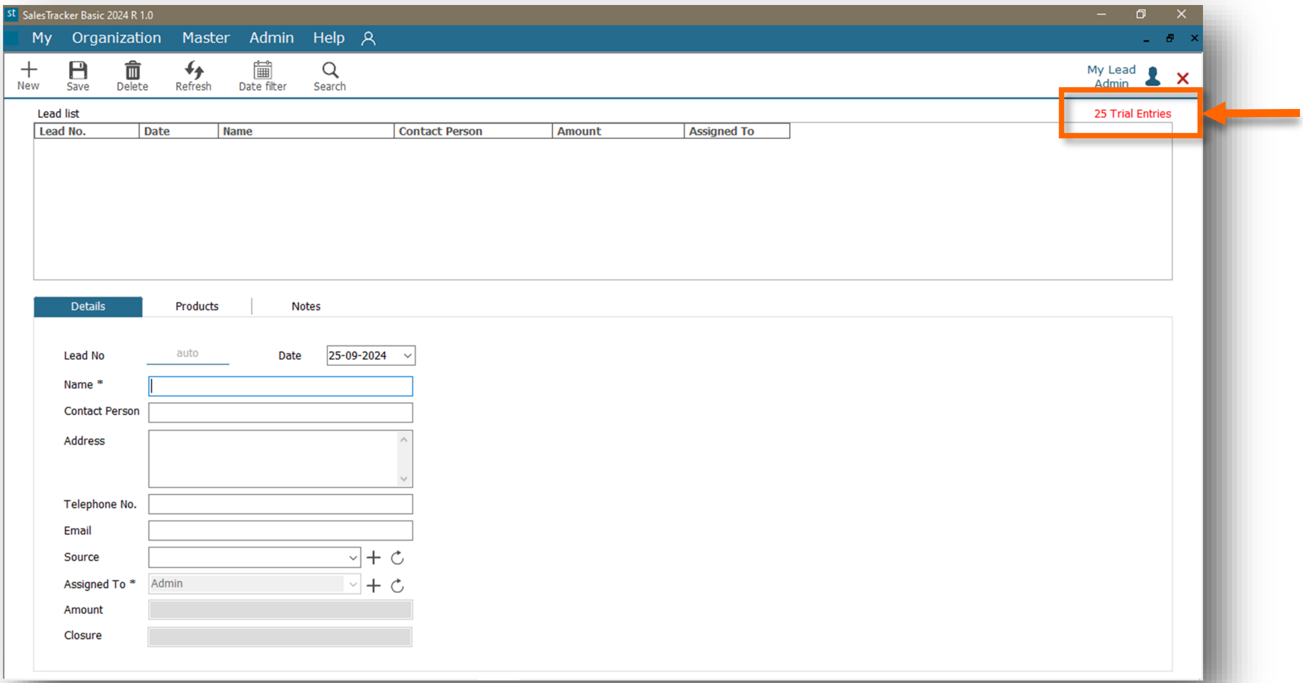
3 Entering your first Lead

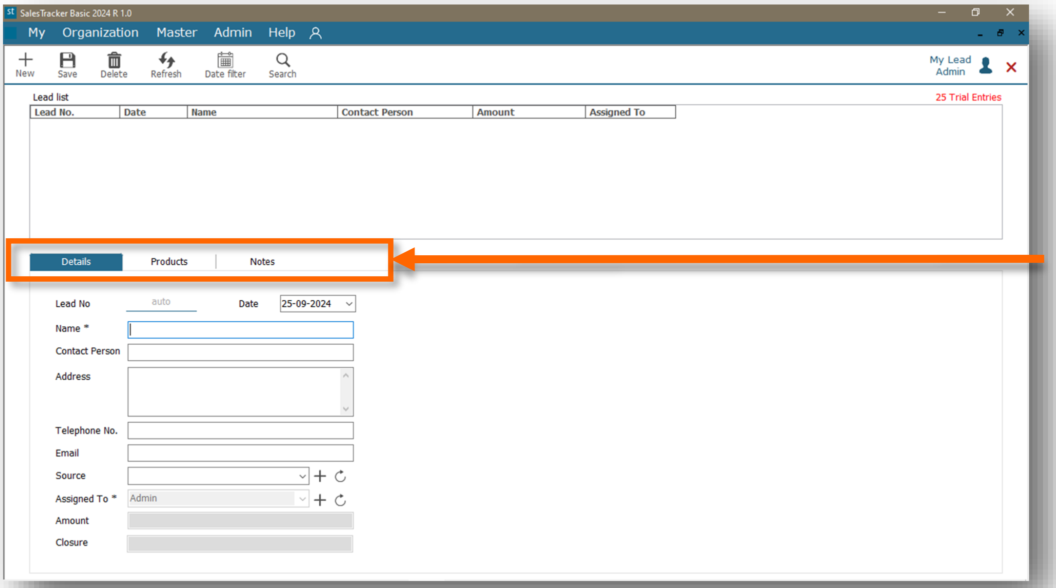


Go to

My > Leads

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

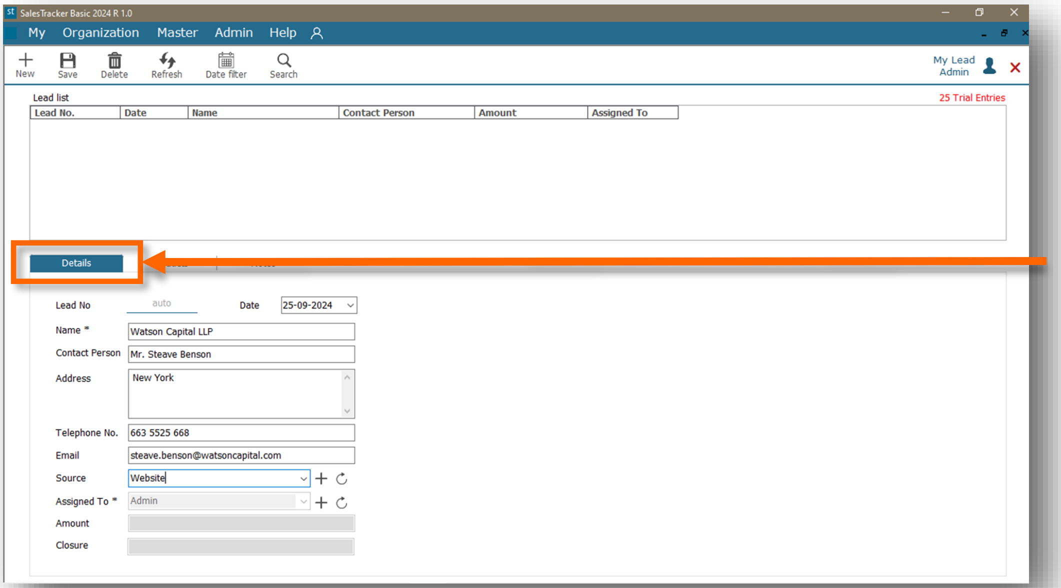




There are three tabs:

- **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.

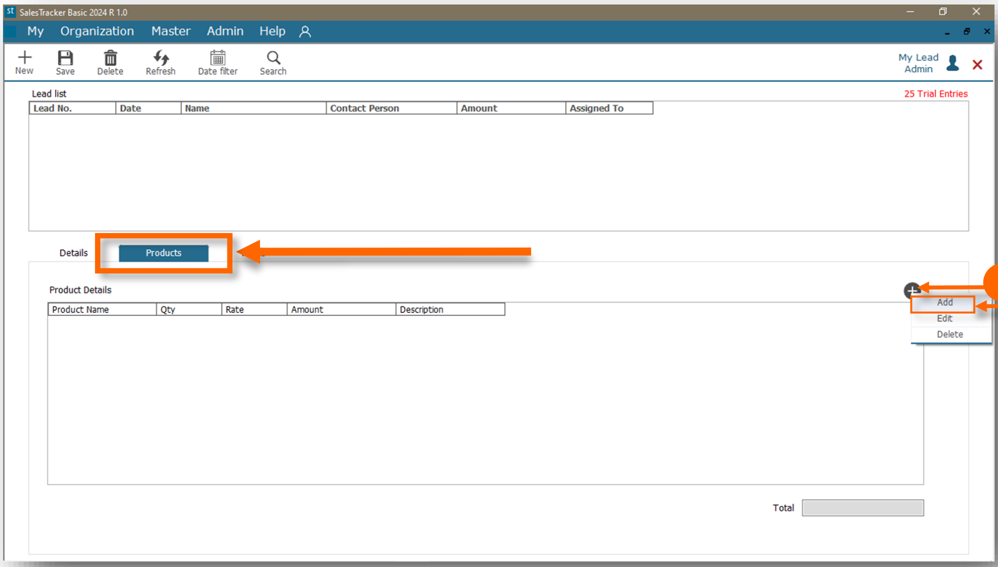


Fill in the Details:

- 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.

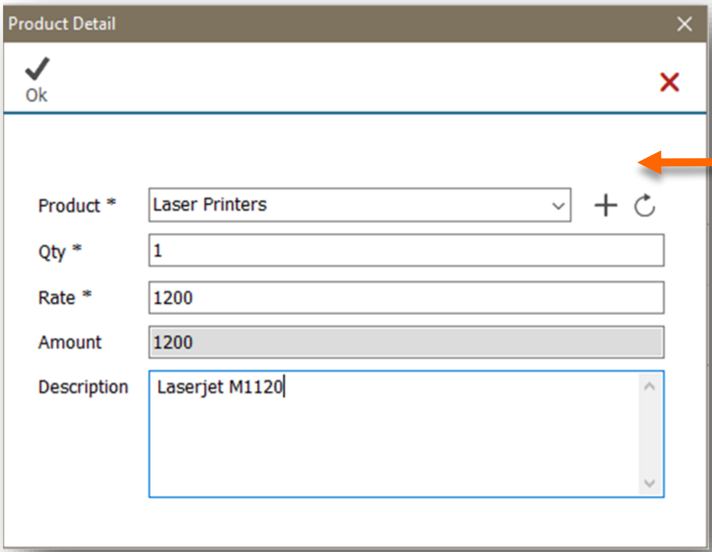


Products Tab:

1. Click on the Plus Icon

2. Select **Add**

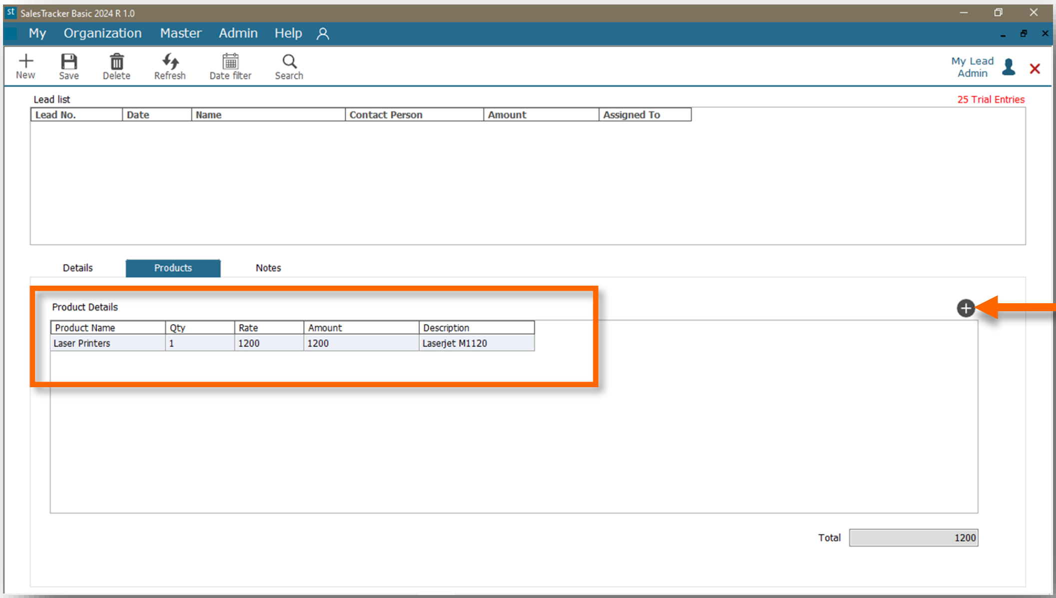
Product details window will open



Product Details:

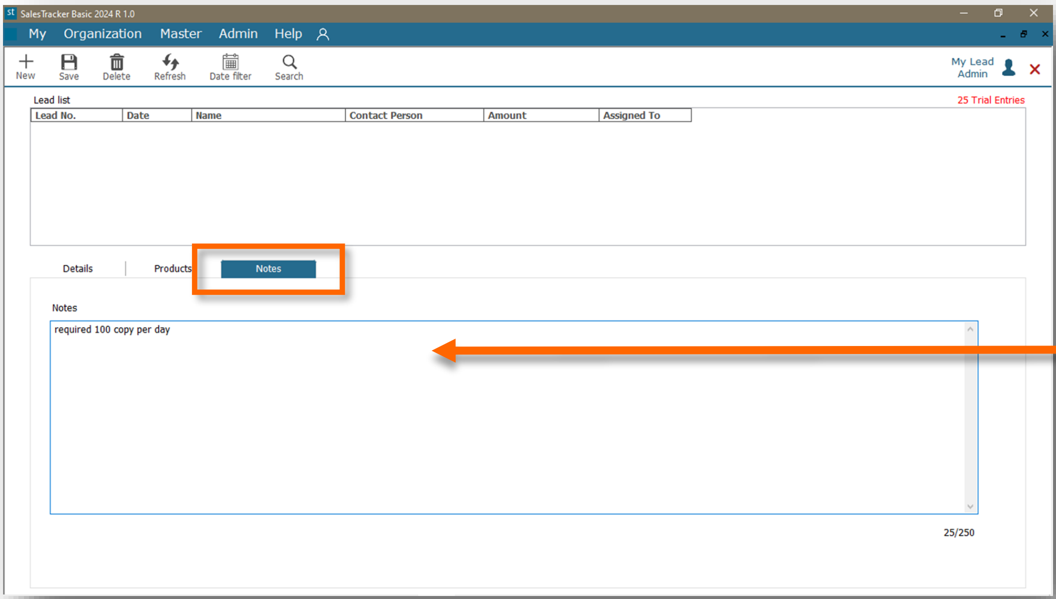
- Select Product
- Quantity
- Rate
- Amount will be auto calculated.
- Enter any notes or description

Click on **Ok** to save.



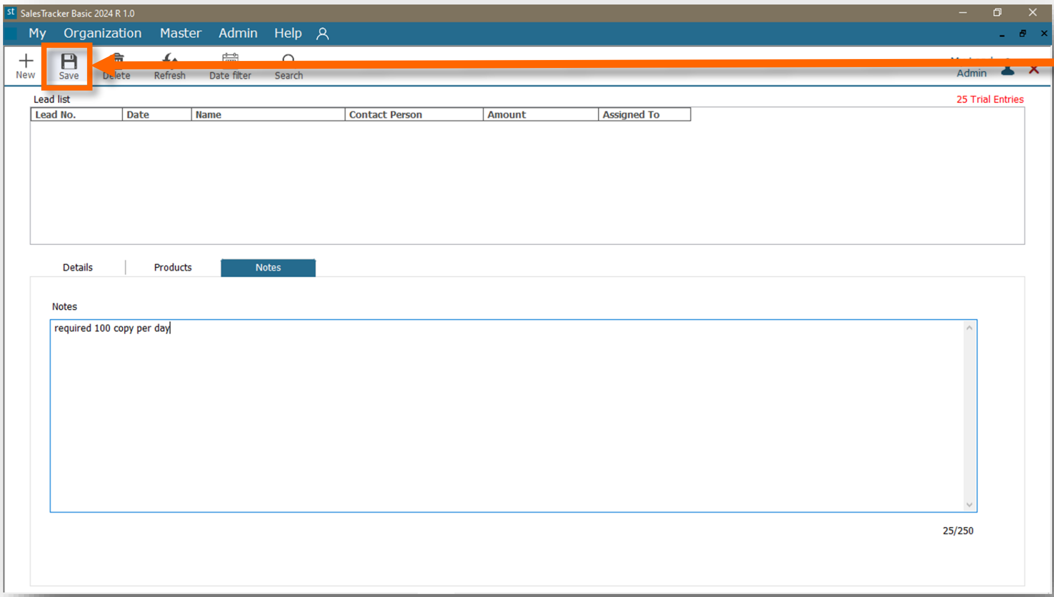
To add multiple Products click on the **plus** icon > Select **Add**.

Repeat the same process.

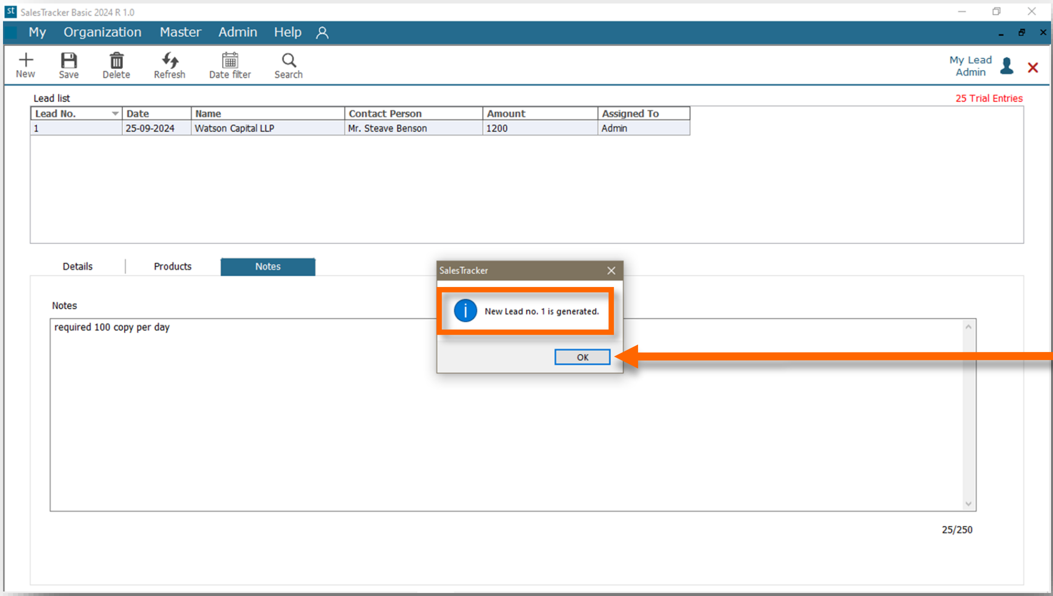


Notes Tab:

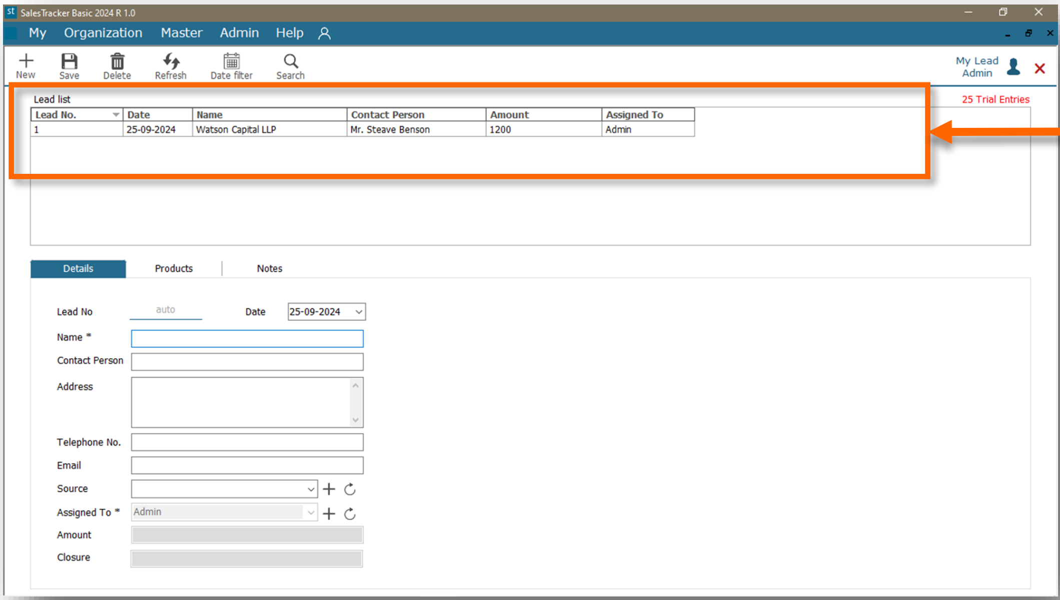
Enter any notes or Remarks here.



Click on **Save**.



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



Lead record is saved..!

Congratulation

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

Thank you

We hope this was successful. Kindly Call us or WhatsApp **+91.99 201 401 00** for any queries.

We recommend you to see our **Entering Your first Follow Up** Help file Next.

For more info visit: **https://www.spinso.com**