



SPINSO[®]



Basic edition

SalesTracker

manage leads & follow-ups



Entering your first Followup (Trial Edition)

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

1

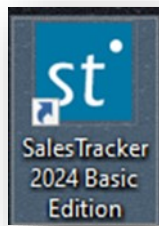
INDEX

Steps

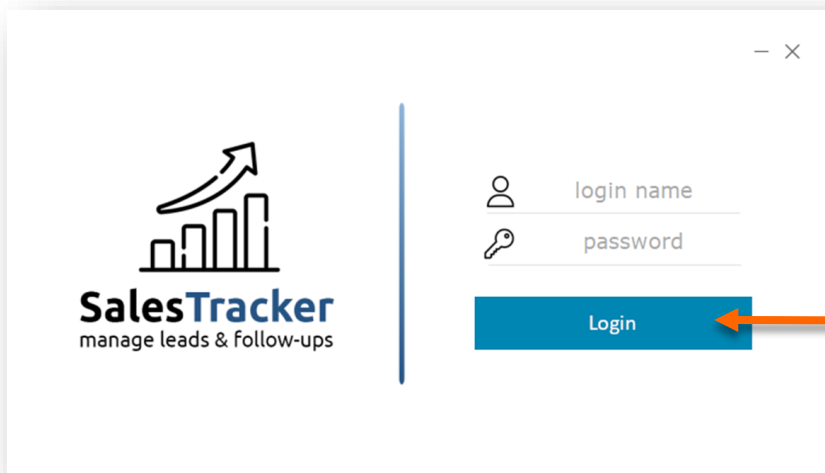
1. Index _____ Pg 2
2. Login _____ Pg 3
3. Entering your first Followup _____ Pg 4

2

Login



Start **SalesTracker**.

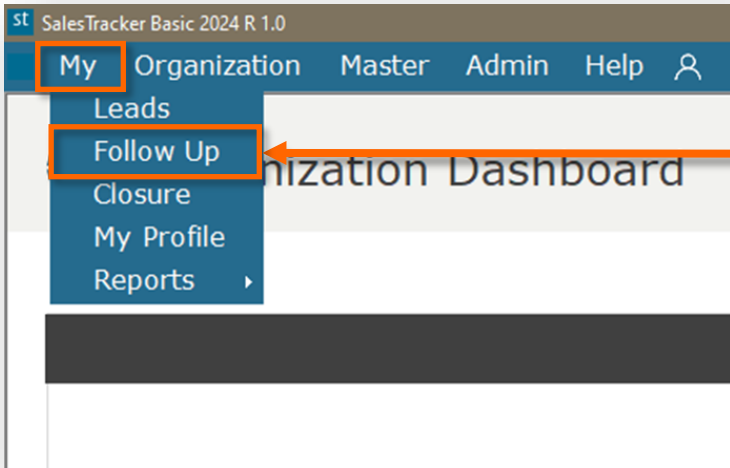


Enter Login name and password

Click on **Login**

3

Entering your first Followup



Go to

My > Follow Up

st SalesTracker Basic 2024 R 1.0

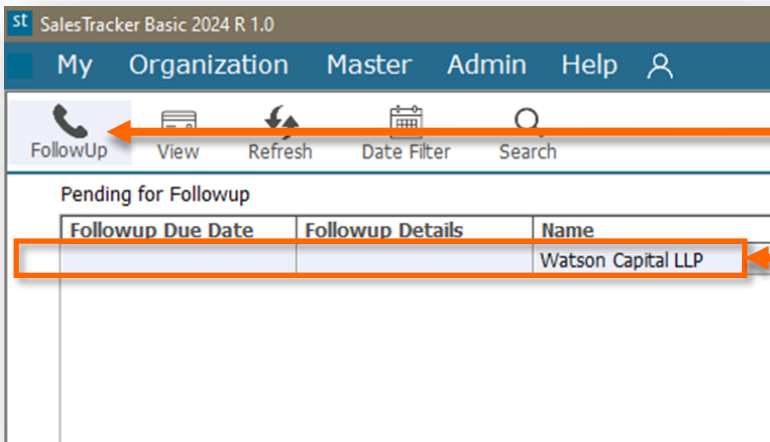
My Organization Master Admin Help

FollowUp View Refresh Date Filter Search

My Follow Up Admin

Pending for Followup

Followup Due Date	Followup Details	Name	Contact Person	Telephone No	Email	Amount	Lead No	Lead Date	Assigned To
		Watson Capital LLP	Mr. Steave Benson	663 5525 668	steave.benson...	1200	1	25-09-2024	Admin



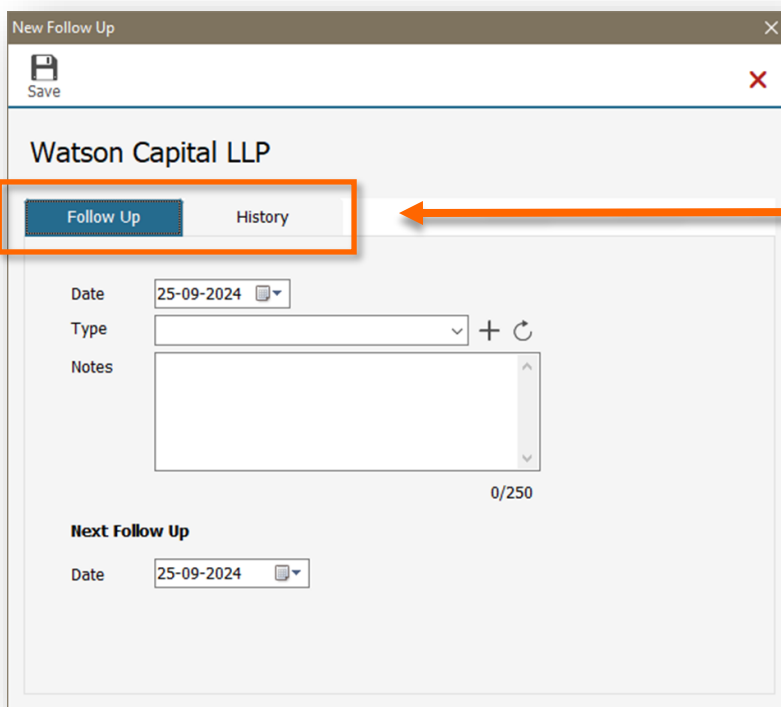
2

In the Follow Up screen,

- Select a record from the list
- Click on **Follow Up**.

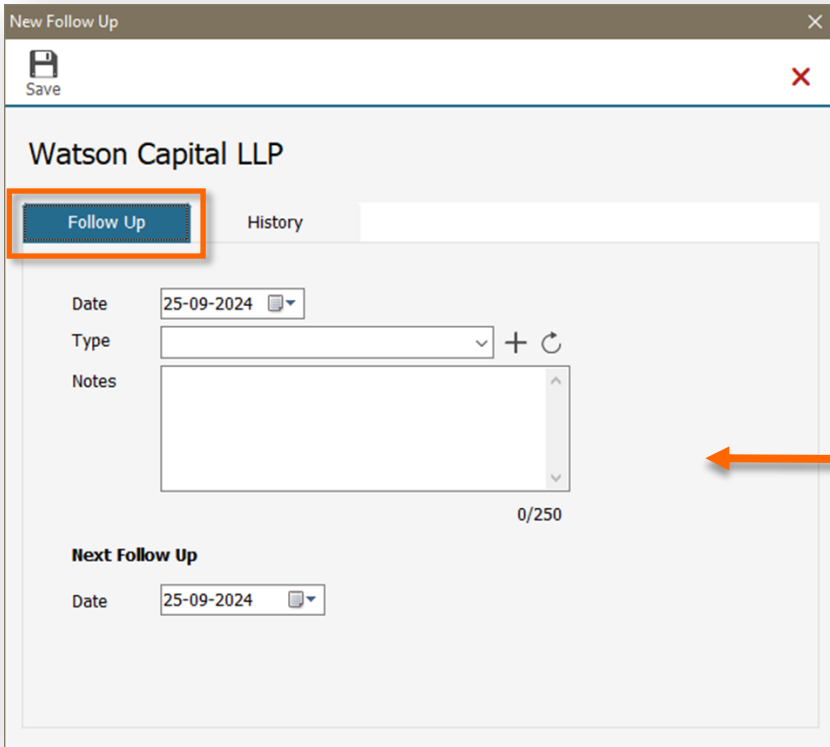
1

Follow up window will open.



Here, we can see two tabs:

- **Follow Up** : Here we enter follow up details.
- **History** : Here we see follow up history.



New Follow Up

Save

Watson Capital LLP

Follow Up History

Date: 25-09-2024

Type: [dropdown]

Notes: [text area]

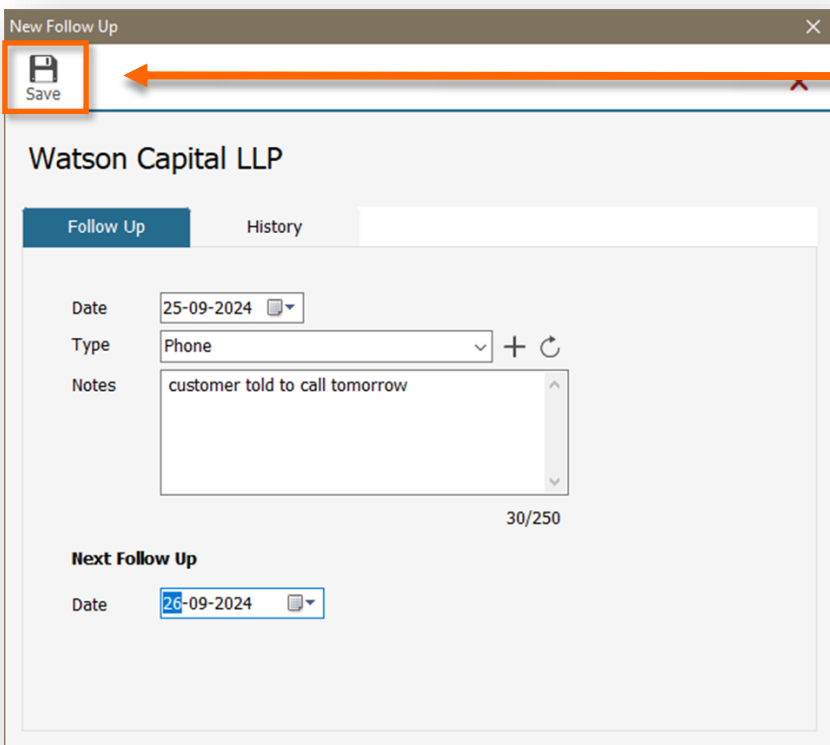
0/250

Next Follow Up

Date: 25-09-2024

Enter Follow Up details:

- Select Follow Up Type
- Enter any notes or remarks
- Update Next follow up date.



New Follow Up

Save

Watson Capital LLP

Follow Up History

Date: 25-09-2024

Type: Phone

Notes: customer told to call tomorrow

30/250

Next Follow Up

Date: 26-09-2024

Click on **Save**.

New Follow Up

Save

Watson Capital LLP

Follow Up History

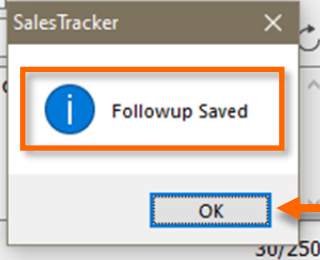
Date: 25-09-2024

Type: Phone

Notes: customer told to

Next Follow Up

Date: 26-09-2024



Click on OK.

SalesTracker Basic 2024 R 1.0

My Organization Master Admin Help

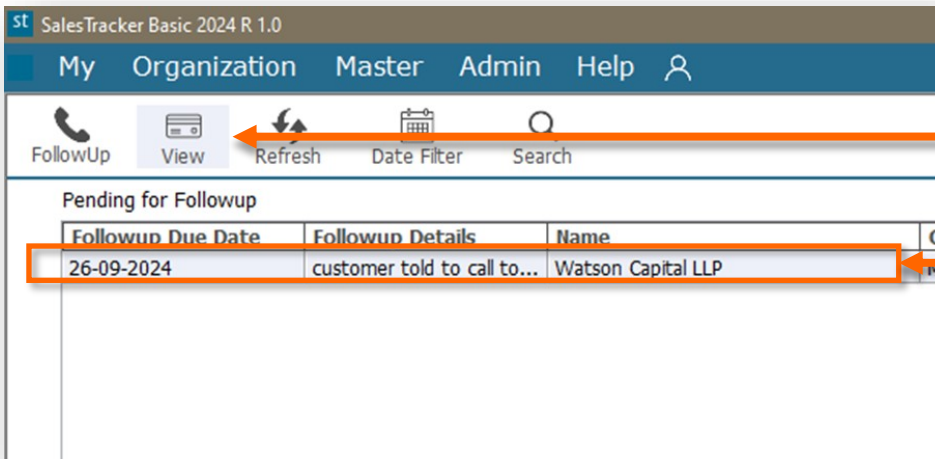
FollowUp View Refresh Date Filter Search

My Follow Up Admin

Pending for Followup

Followup Due Date	Followup Details	Name	Contact Person	Telephone No	Email	Amount	Lead No	Lead Date	Assigned To
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- Since we registered/entered then saved a follow up, that record will be removed from this list.
- The record will be fetched again on Next follow up due date.
- Therefore, follow ups that are due for today or was pending will be seen in this list.



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My Organization Master Admin Help

FollowUp View Refresh Date Filter Search

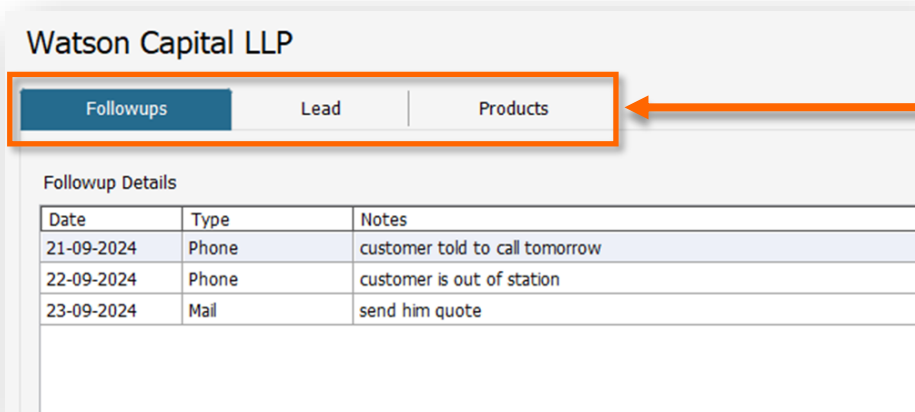
Pending for Followup

Followup Due Date	Followup Details	Name
26-09-2024	customer told to call to...	Watson Capital LLP

Note:

2 Selecting a record from the list, then clicking on **view** button will give detailed view of follow ups and its lead.

1



Watson Capital LLP

Followups Lead Products

Followup Details

Date	Type	Notes
21-09-2024	Phone	customer told to call tomorrow
22-09-2024	Phone	customer is out of station
23-09-2024	Mail	send him quote

Follow up View button Shows

- Follow ups records
- Lead details
- Products details

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 **Your first Lead Closure** Help file Next.

For more info visit: <https://www.spinso.com>