



Basic edition

SalesTracker

manage leads & follow-ups



Your first Lead Closure (Trial edition)

Step by step guide on your first lead closure in SalesTracker Basic.

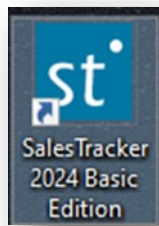
1

INDEX

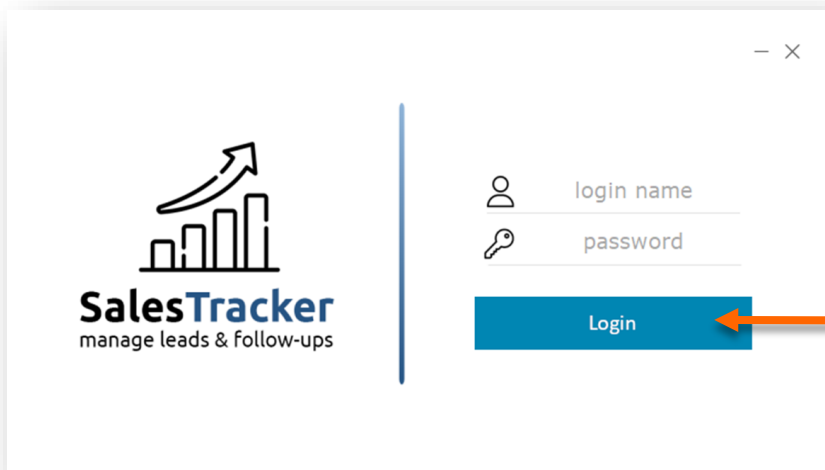
Steps

1. Index _____ Pg 2
2. Login _____ Pg 3
3. Your first Lead Closure _____ Pg 4

2 Login



Start **SalesTracker**.

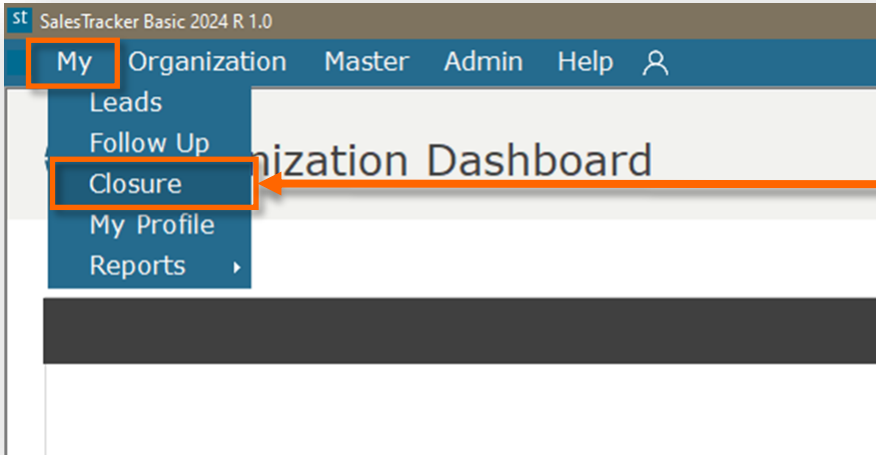


Enter Login name and password

Click on **Login**

3

Your first Lead Closure



Go to
My > Closure

st SalesTracker Basic 2024 R 1.0

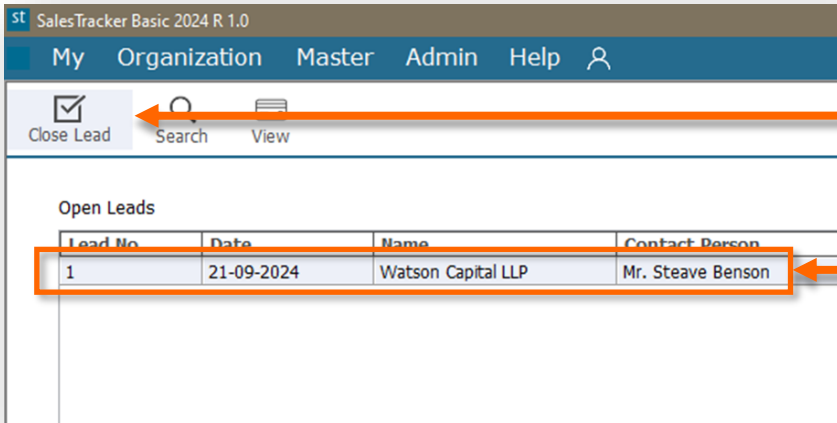
My Organization Master Admin Help

Close Lead Search View

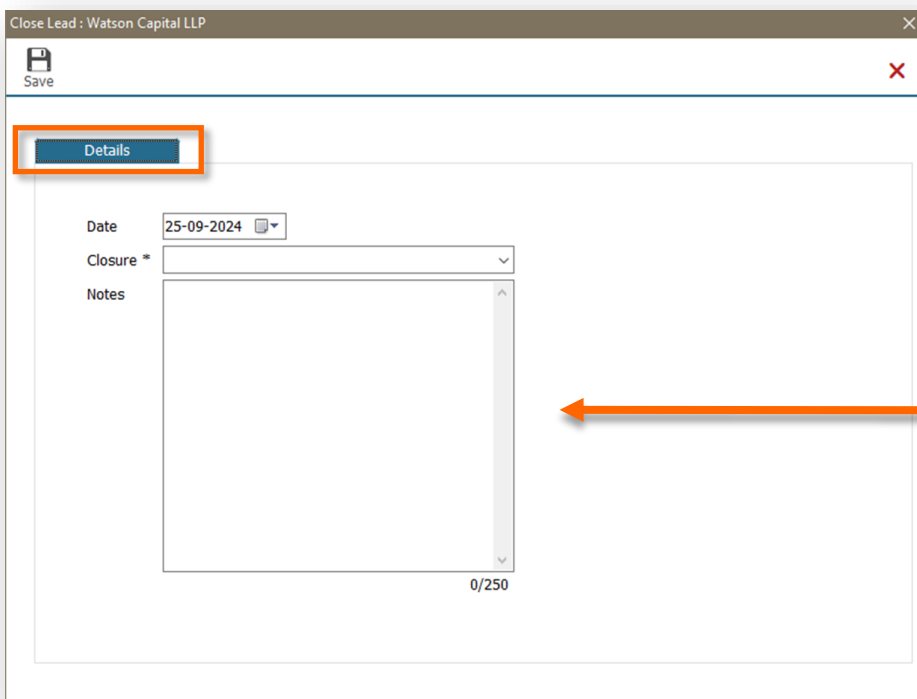
My Closure Admin

Open Leads

Lead No	Date	Name	Contact Person	Amount	Source	Assigned To	Notes
1	21-09-2024	Watson Capital LLP	Mr. Steave Benson	1200	Website	Admin	required 100 copy per day

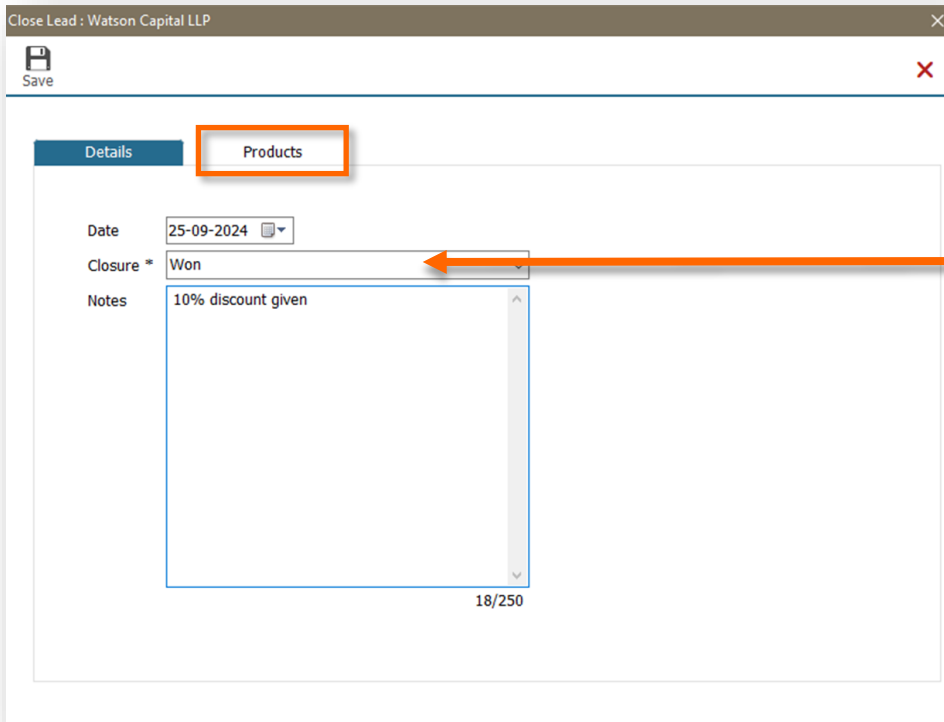


1. Select/Click the lead you want to close.
2. Click on **Close Lead**.
Close Lead window will open.

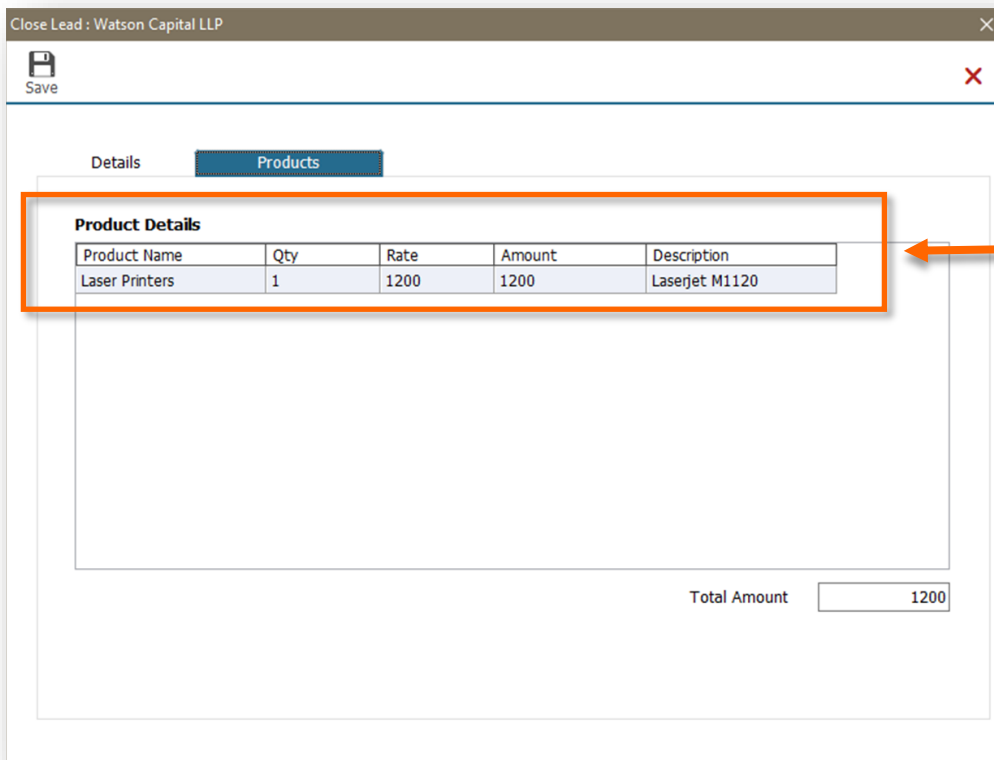


Fill in the Details Tab:

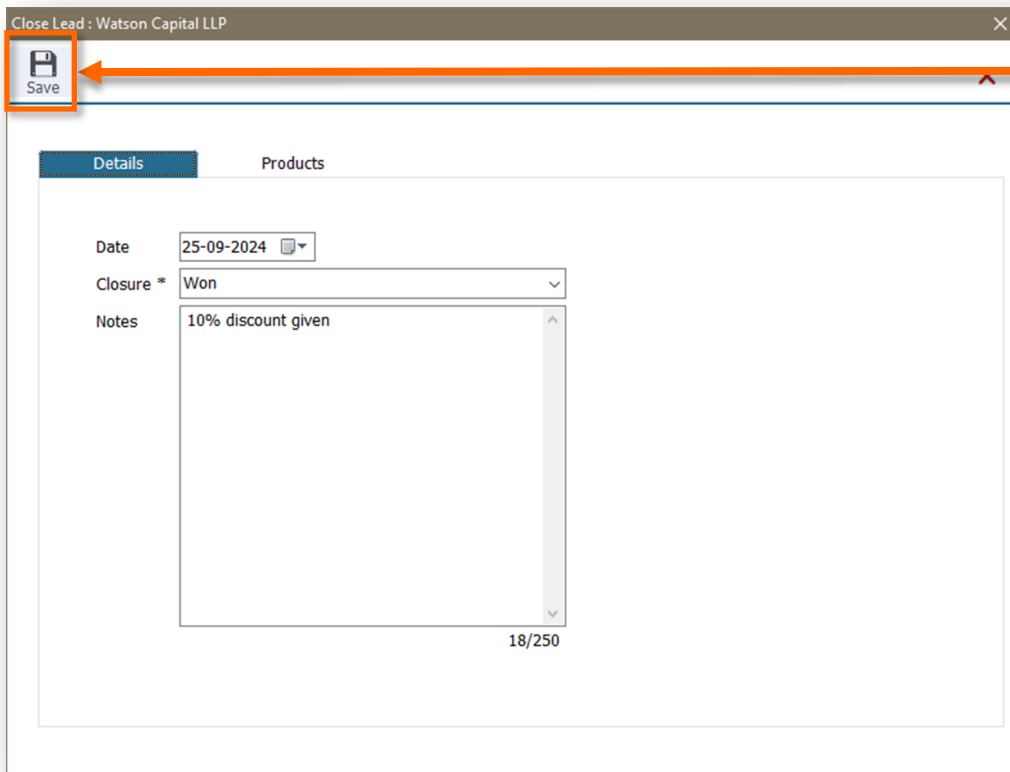
- Date
- Select Closure type [Won, lost, Cancel]
- Notes/Remarks



Since we selected Won in Closure, Product Tab is Active



We can see lead product list here.



Close Lead : Watson Capital LLP

Save

Details Products

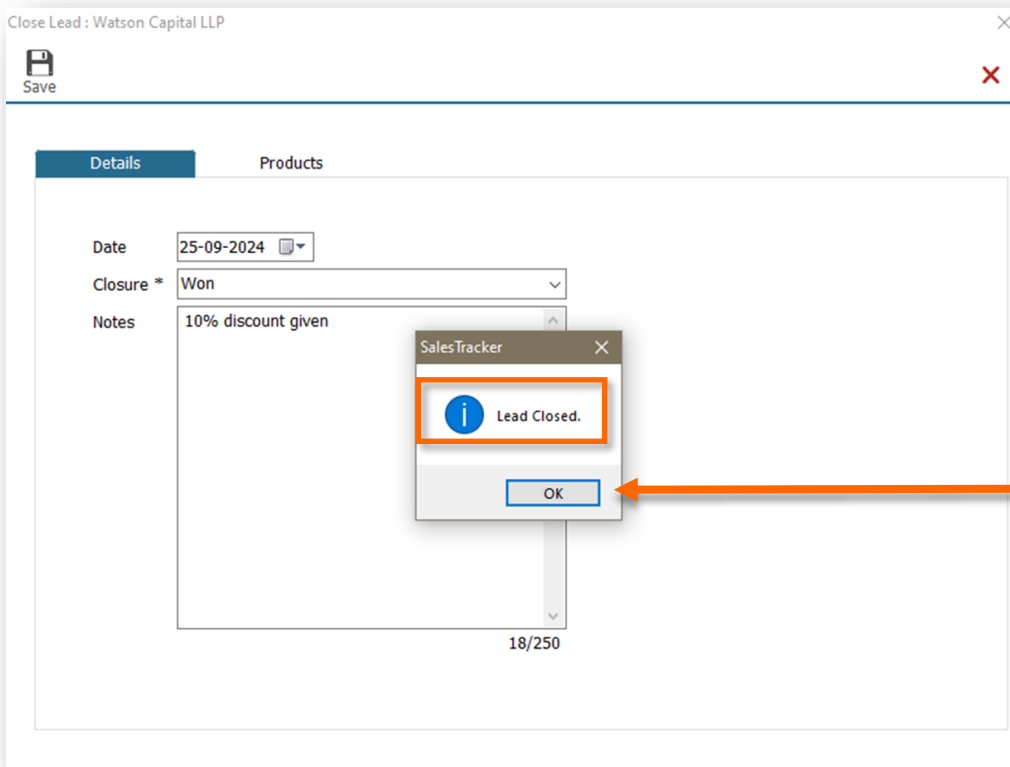
Date 25-09-2024

Closure * Won

Notes 10% discount given

18/250

Click on **Save**.



Close Lead : Watson Capital LLP

Save

Details Products

Date 25-09-2024

Closure * Won

Notes 10% discount given

18/250

SalesTracker

Lead Closed.

OK

Click on **OK**.

SalesTracker Basic 2024 R 1.0

My Organization Master Admin Help

Close Lead Search View My Closure Admin

Open Leads

Lead No	Date	Name	Contact Person	Amount	Source	Assigned To	Notes
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We have closed our lead, hence that record is removed from the list.

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



View Reports

how to view reports in SalesTracker Basic.

[ST Basic How-To-View-Reports.pdf](#)

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SPINSO

601, Odyssey IT Park,
Road No 9, Wagle Estate,
Near Old Passport Office,
Thane 400 604.
Maharashtra, INDIA

91.99 201 401 00

sales@spinso.com

www.SPINSO.in