



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

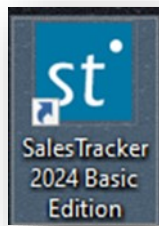
## Steps

---

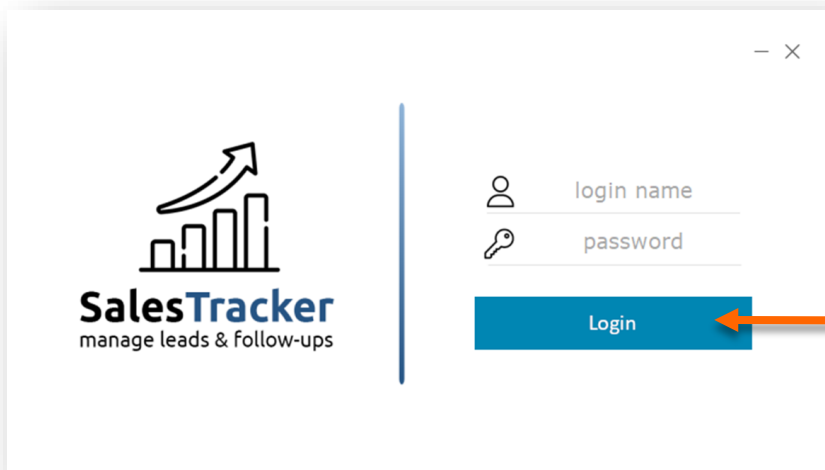
1. Index \_\_\_\_\_ Pg 2
2. Go To Closure Screen \_\_\_\_\_ Pg 3
3. Your first Lead Closure \_\_\_\_\_ Pg 4

# 2

# Login



Start **SalesTracker**.

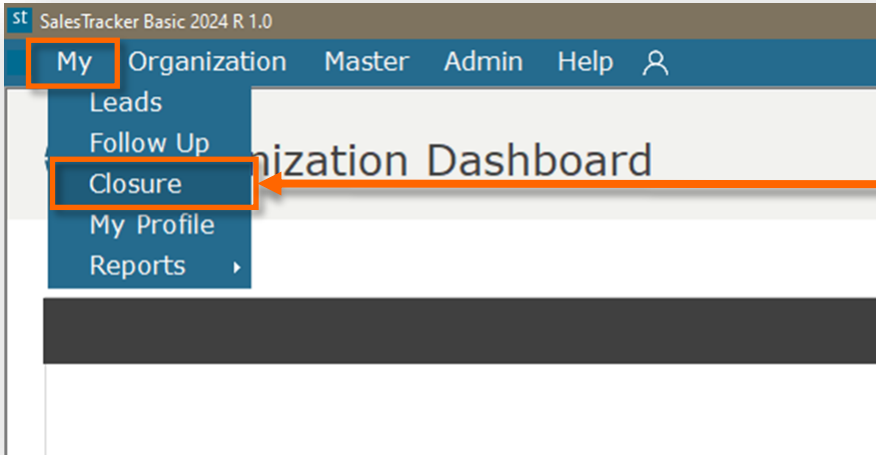


Enter Login name and password

Click on **Login**

## 3

# Your first Lead Closure



Go to  
My > Closure

st SalesTracker Basic 2024 R 1.0

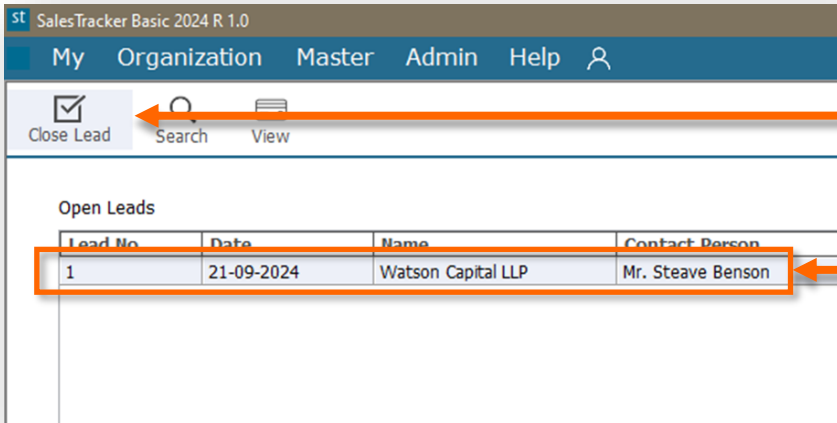
My Organization Master Admin Help

Close Lead Search View

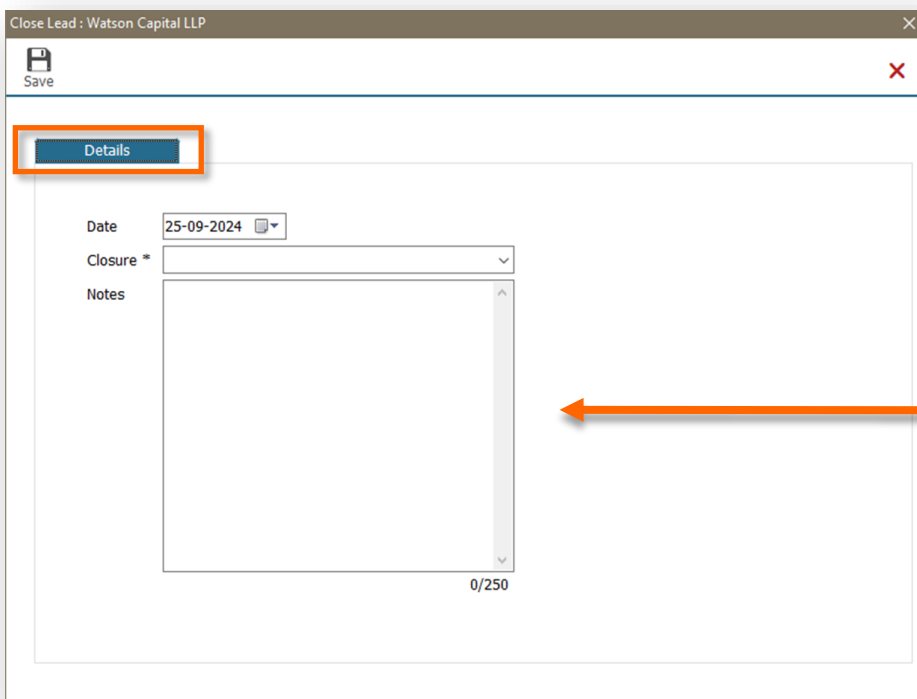
My Closure Admin

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

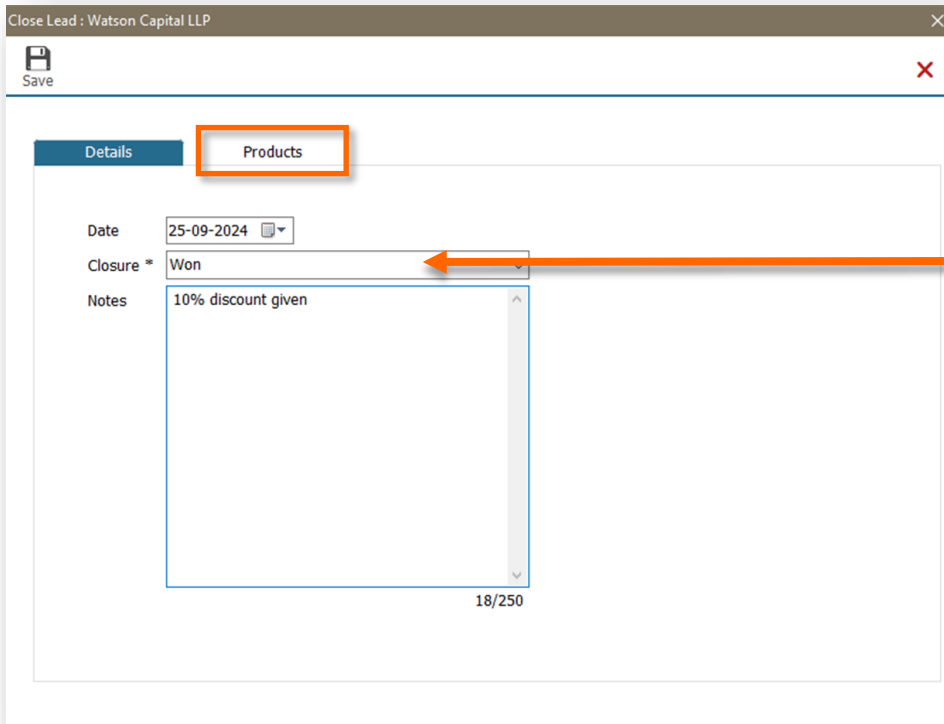


- Select/Click the lead you want to close.
- Click on **Close Lead**.  
Close Lead window will open.

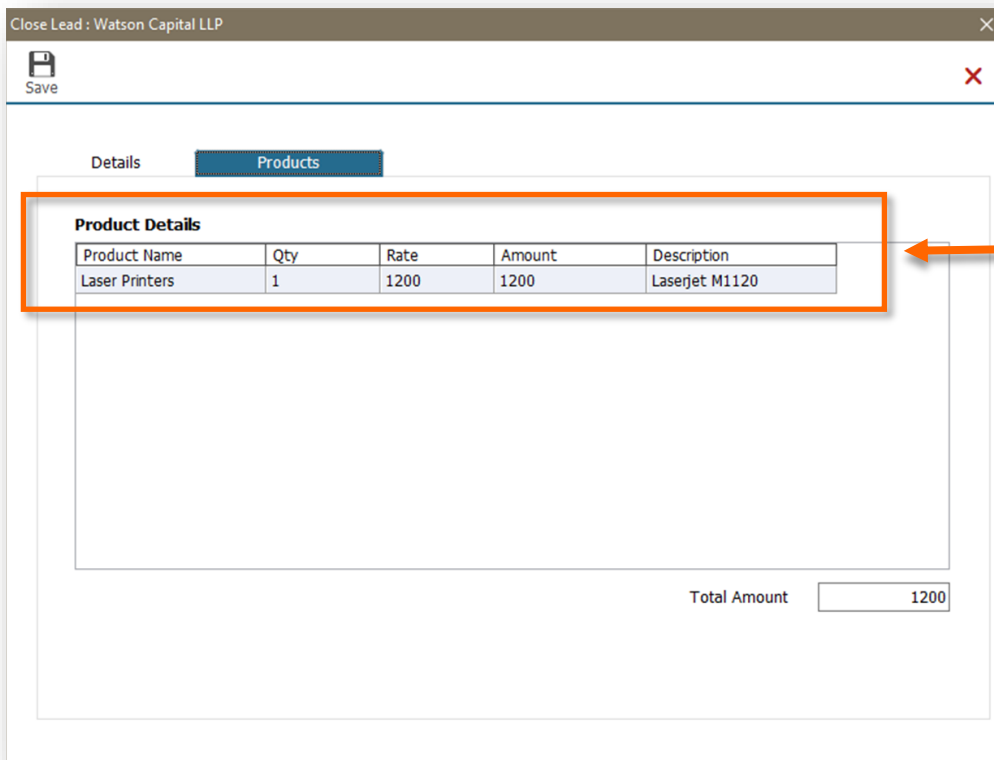


**Fill in the Details Tab:**

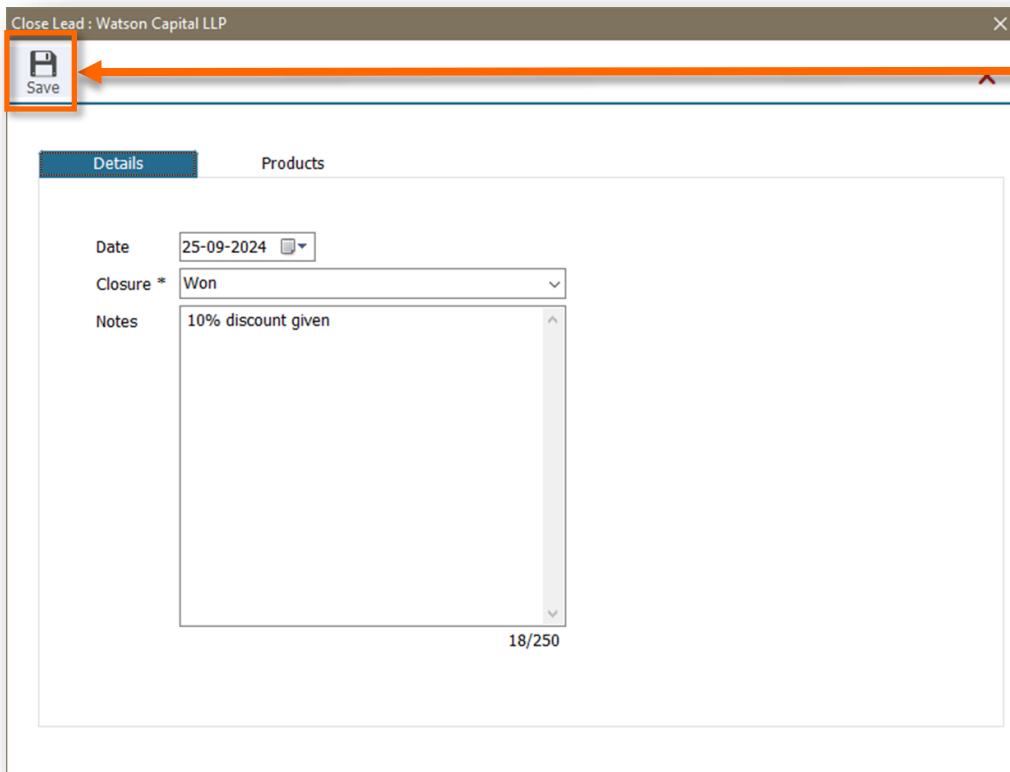
- Date
- Select Closure type [Won, lost, Cancel]
- Notes/Remarks



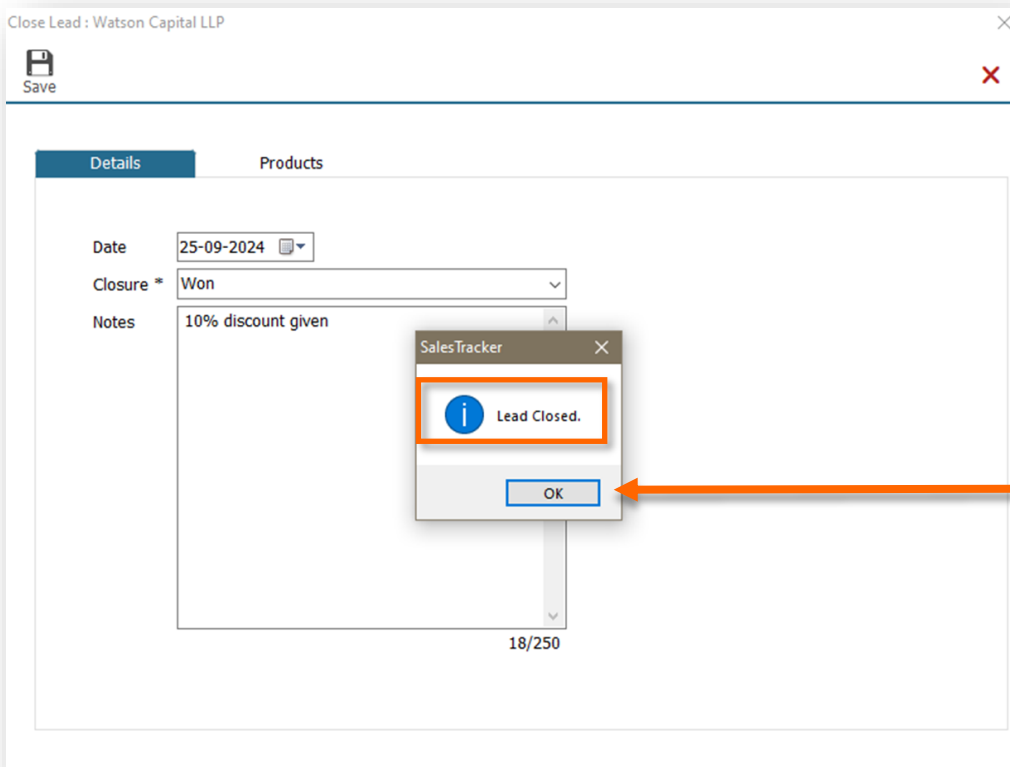
Since we selected Won in Closure, Product Tab is Active



We can see lead product list here.



Click on **Save**.



Congratulations, you have closed your first Lead Successfully. 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
---------	------	------	----------------	--------	--------	-------------	-------

We have closed our lead, hence that record is removed from the list.



# 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 **How to View Reports** Help file Next.

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