



SPINSO<sup>®</sup>

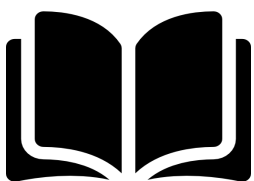


Basic edition

# SalesTracker

manage leads & follow-ups

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## How To View Reports (Trial Edition)

Step by step guide on how to view reports in SalesTracker Basic

# 1

# INDEX

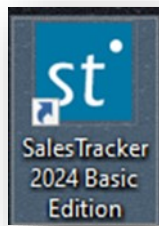
## Steps

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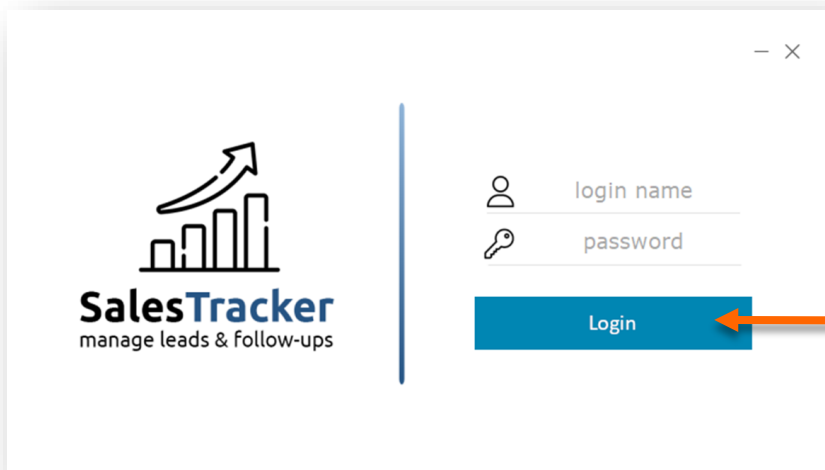
1. Index \_\_\_\_\_ Pg 2
2. Login \_\_\_\_\_ Pg 3
3. How To View Reports \_\_\_\_\_ Pg 4

# 2

# Login



Start **SalesTracker**.

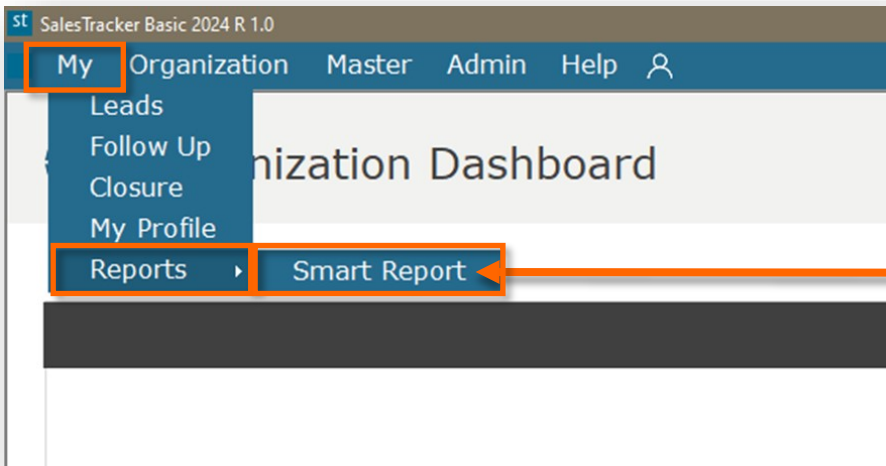


Enter Login name and password

Click on **Login**

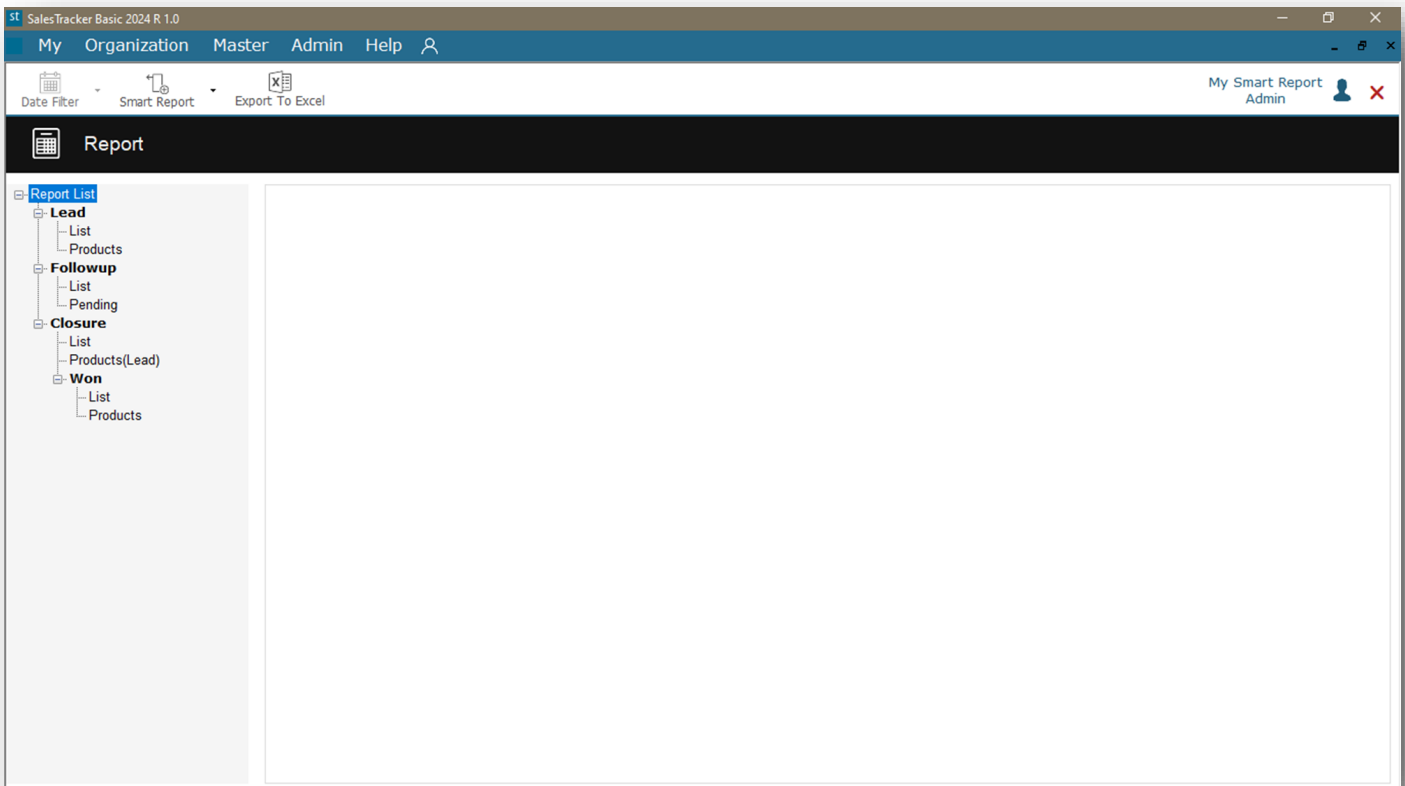
# 3

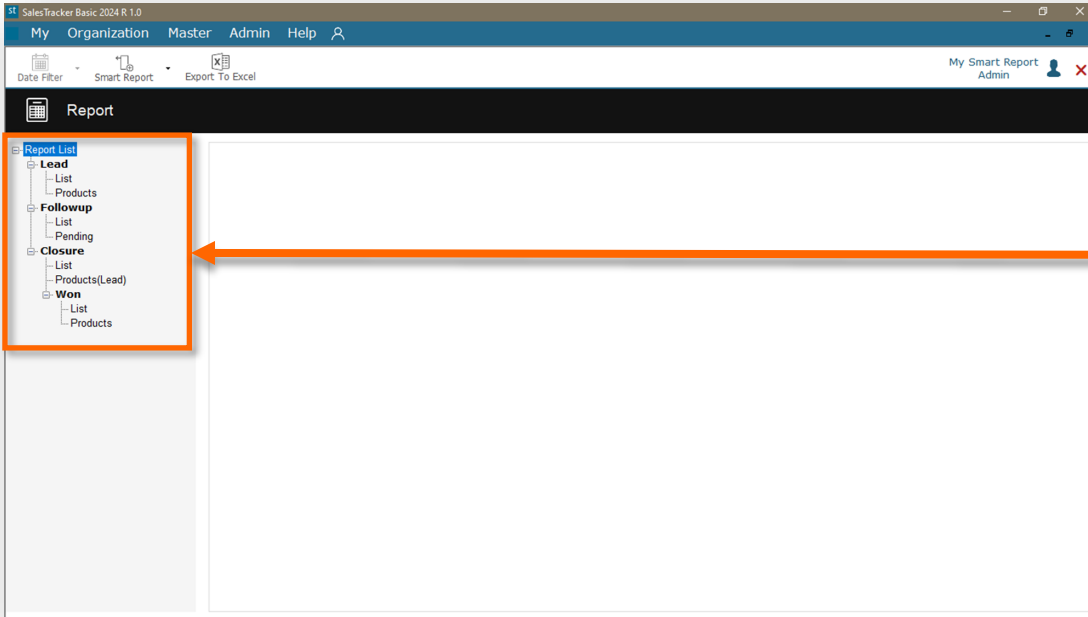
# How To View Reports



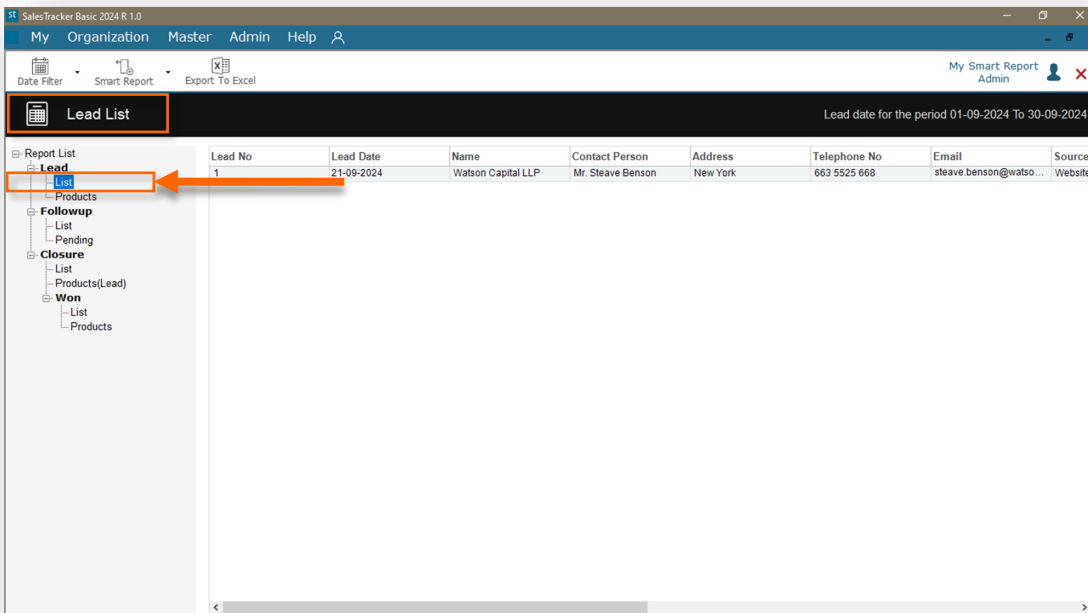
Go to

**My > Reports > Smart Report**





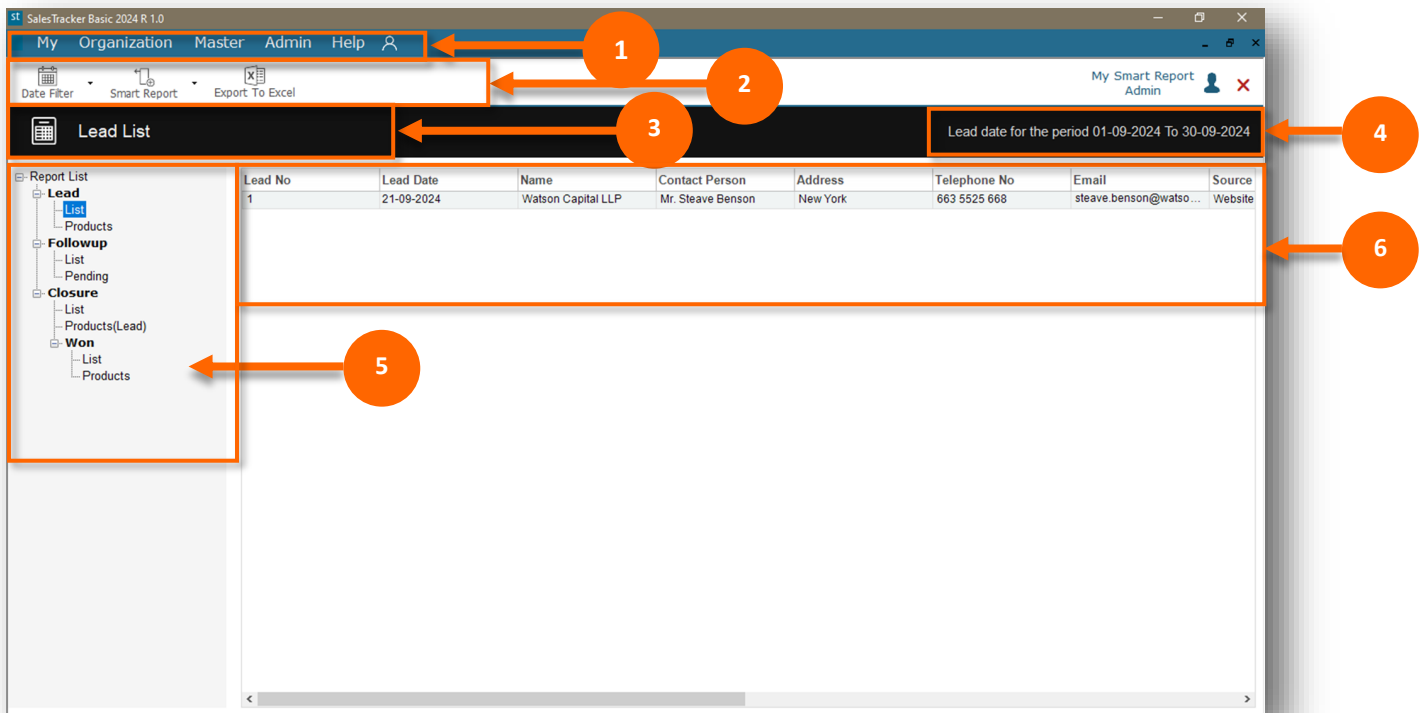
Select any item on the list, to view data.



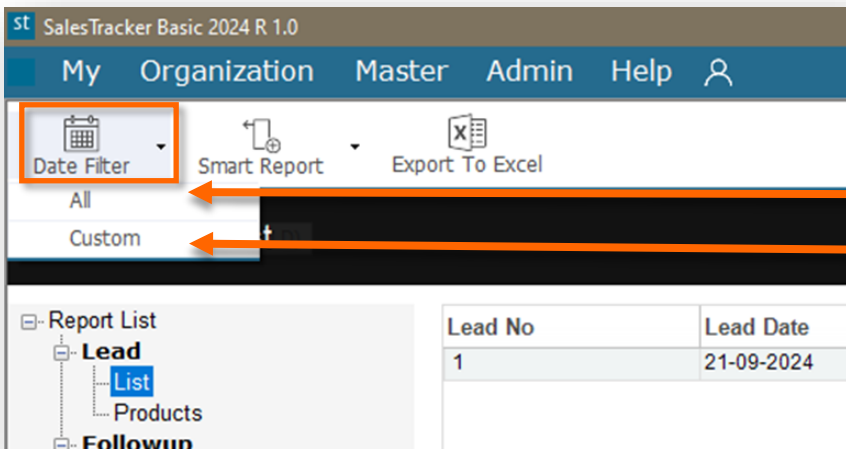
Here is an example:  
Select **Lead > List** to view Leads list

# Smart Report Interface

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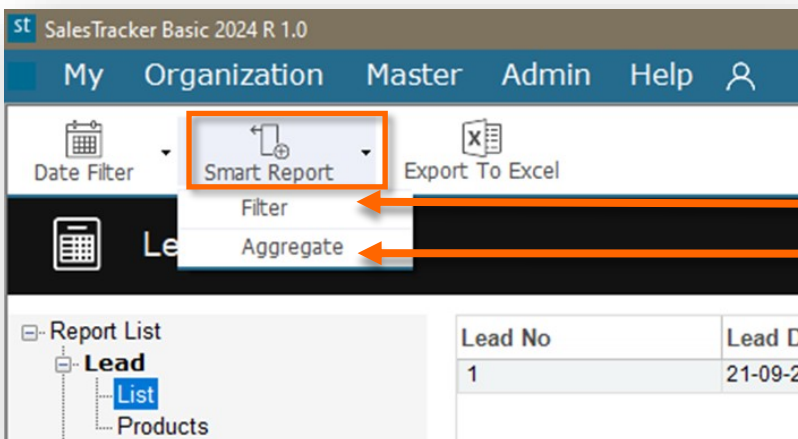


- 1 Menu Bar: Navigate to different screens through these menus.
- 2 Tool Bar: Smart tools to help manage lead easier and faster.
- 3 Title: Title name of the list that is open is shown here.
- 4 Time Period: Time period for which the list is shown. Time period can be changed from Date filter.
- 5 List Item: Select from this to view the respective list.
- 6 List: Selected list is shown here.



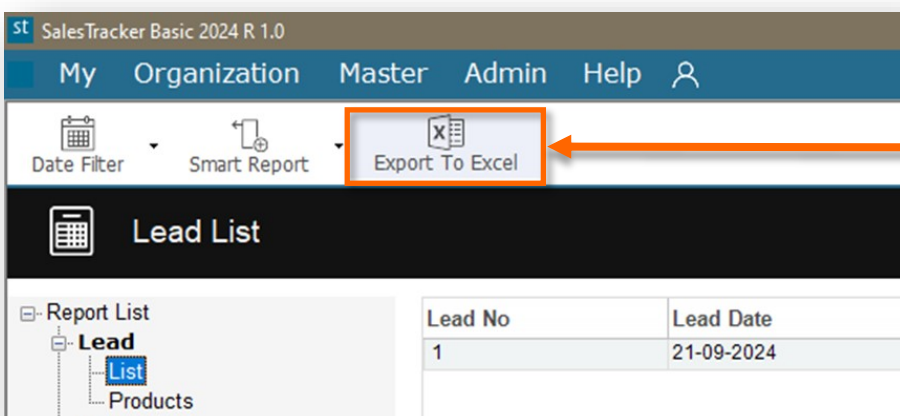
**Date Filter:** This button helps you to filter and show the lead records for the given period of time.

1. All Shows all data.
2. Custom date filter lets you to view leads from a particular period of time.



**1. Filter:** This button helps you to filter data value and show the Lead records.

**2. Aggregate:** Perform math aggregate functions such as sum, average, count, etc.



Click here to Export the data to excel, which you can save in your System for future reference.



# Thank you

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## For more information

Kindly Call us or WhatsApp **+91.99 201 401 00** for any queries.

For more info visit: [spinso.com](https://spinso.com)

### Next step



#### **Lead Screen Interface**

simple guide on Lead Screen Interface in SalesTracker Basic.

[ST Basic Lead-Screen-Interface.pdf](#)

# SPINSO

Celebrating

# 25

years in business

## Other software products

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### ServiceDesk

manage warranties & AMC



### TimeTracker

manage timesheet & approvals



### ComplaintTracker

manage customer complaints



### QuotationTracker

create professional quotation

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