SPINSO

Basic edition

SalesTracker

manage leads & follow-ups

Lead Screen Interface (Trial Edition)

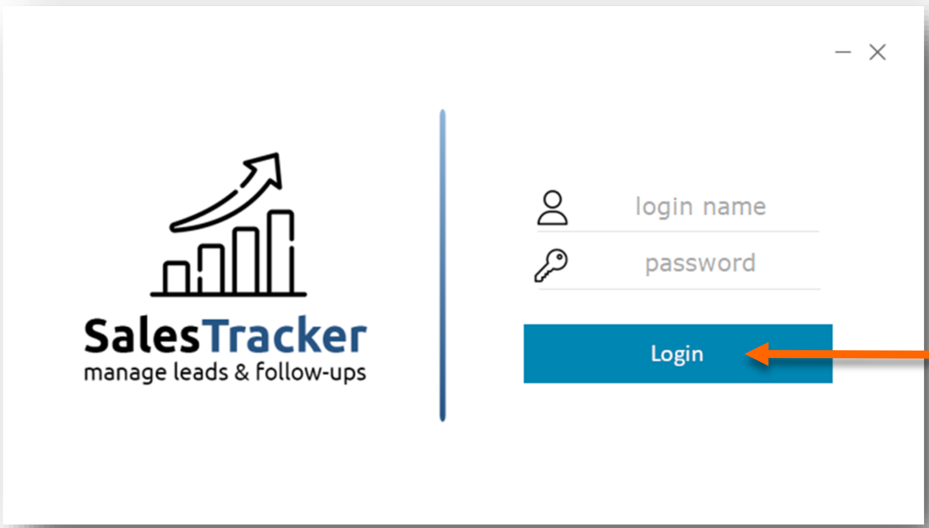
Step by step guide on lead screen interface in SalesTracker Basic.

1 INDEX

Steps

2 Login

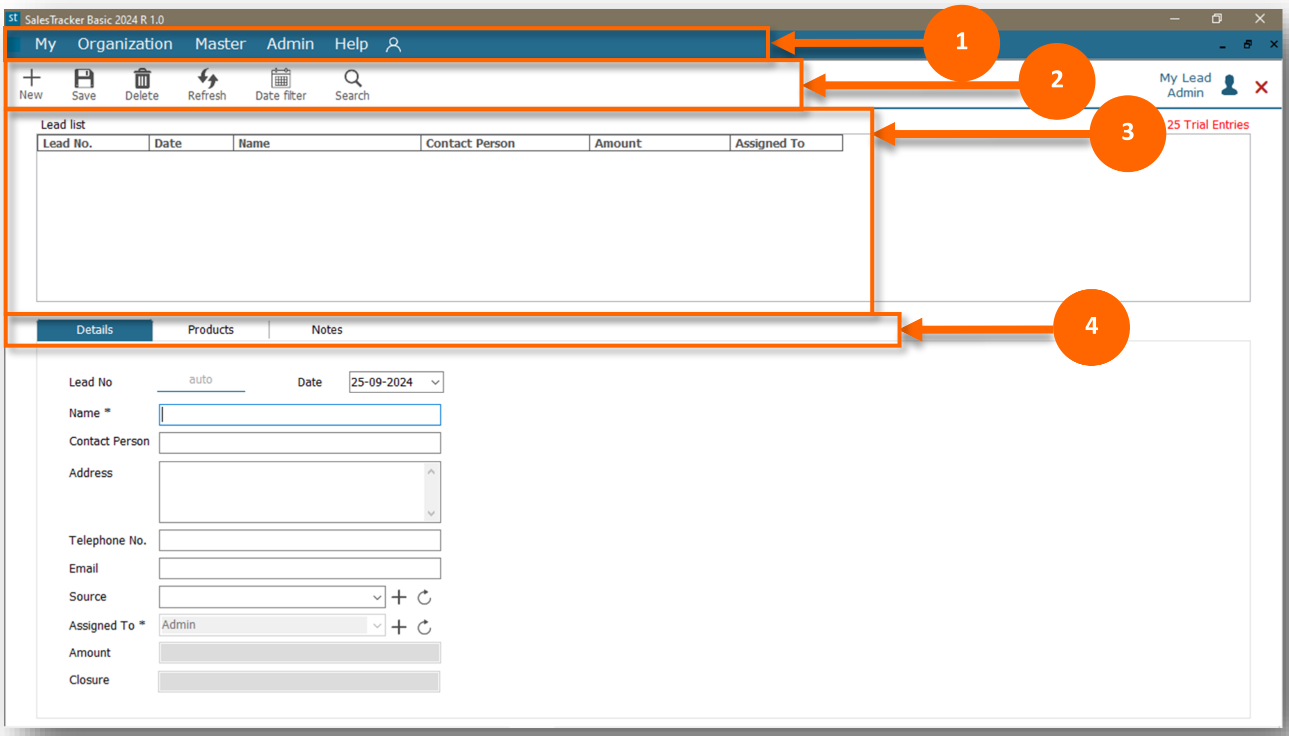
Start **SalesTracker.**



Enter Login name and password

Click on **Login**

3 Lead Screen Interface



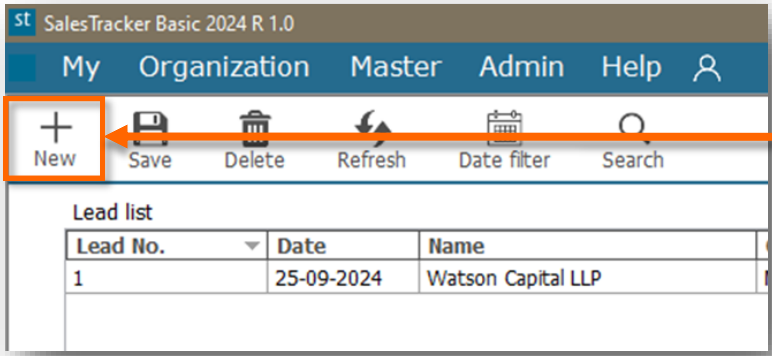
1. Menu Bar: Navigate to different screens through these menus.

2. Tool Bar: Smart tools to help manage lead easier and faster.

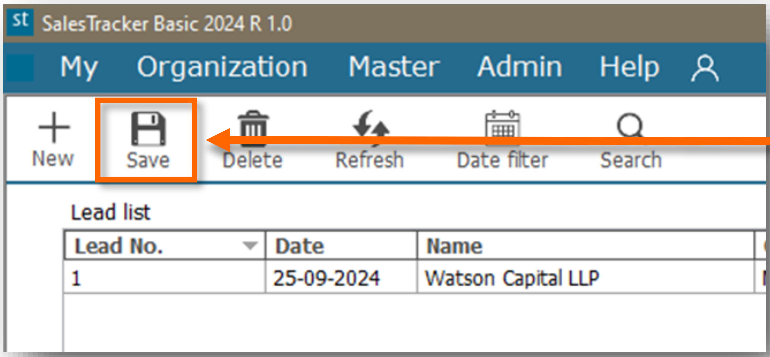
3. Lead list: View all your leads in this list.

4. Tabs: Use the fields of these tab to enter details then save or edit lead. Once saved, these details can be retrieved by selecting the lead from the list or by entering the lead no. in Details tab.

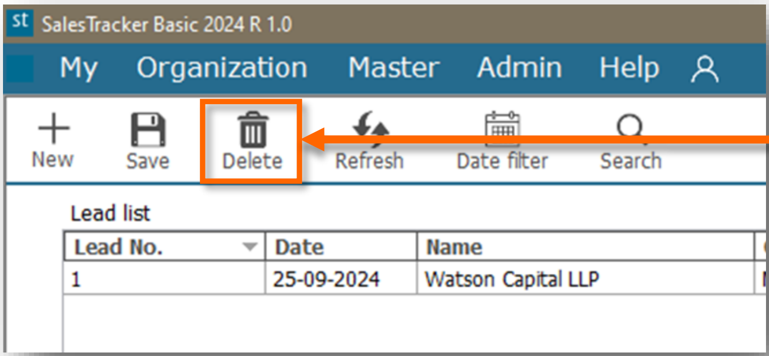
Tool Bar



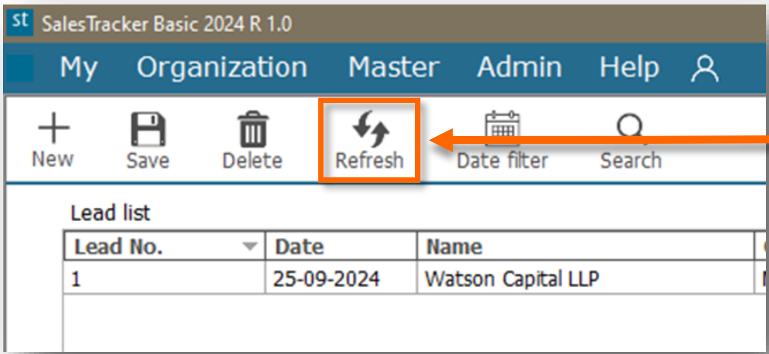
New: Clear the fields and set them as blank. Used while entering a new complaint.



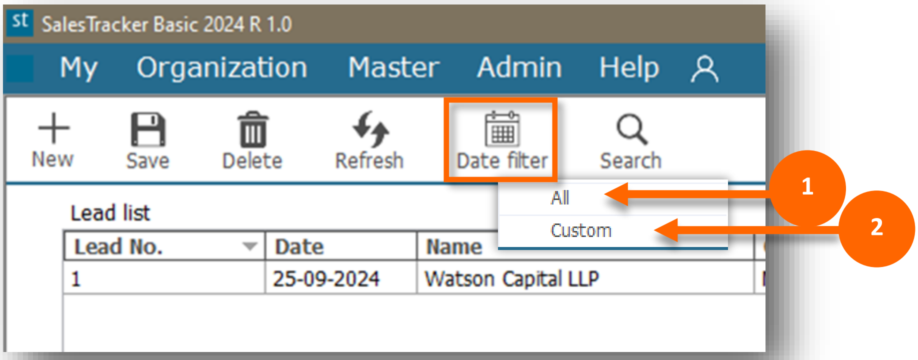
Save : Click on this button to save the complaint.



Delete : Select a lead from the list then click on delete. This will delete the lead from the list.



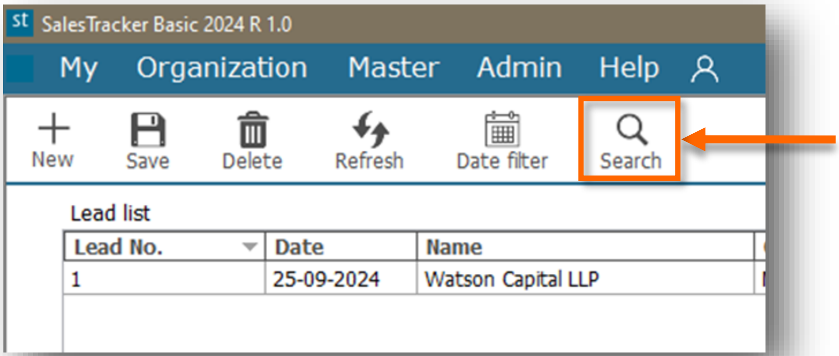
Refresh : to refresh the screen



Date Filter

1. All - Shows all data.

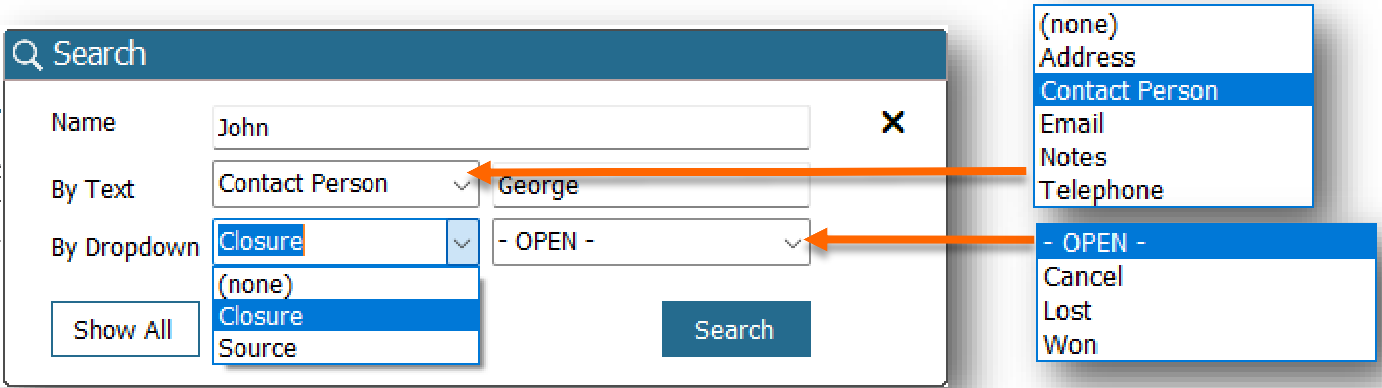
2. Custom - Filter and show data from a particular date.



Search:

Search/find records by entering Name, Tel No. or by selecting Closure type or Source from the Lead list.

Click on **Search**.



Thank you

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

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