

3 Free users for life

SPINSO[®]



Lite edition

SalesTracker

Manage leads & follow-ups





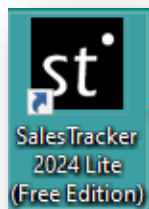
Getting Started

Quick start guide on how to enter basic data required to immediately start using SalesTracker Lite Edition.

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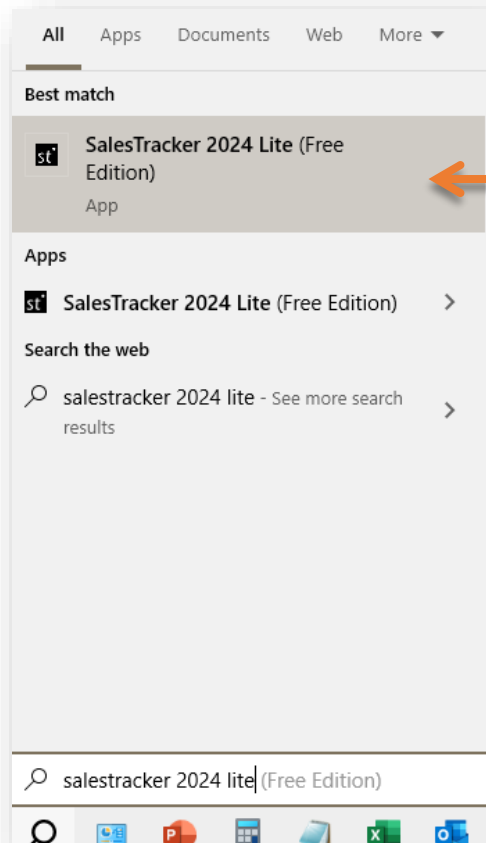
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Login



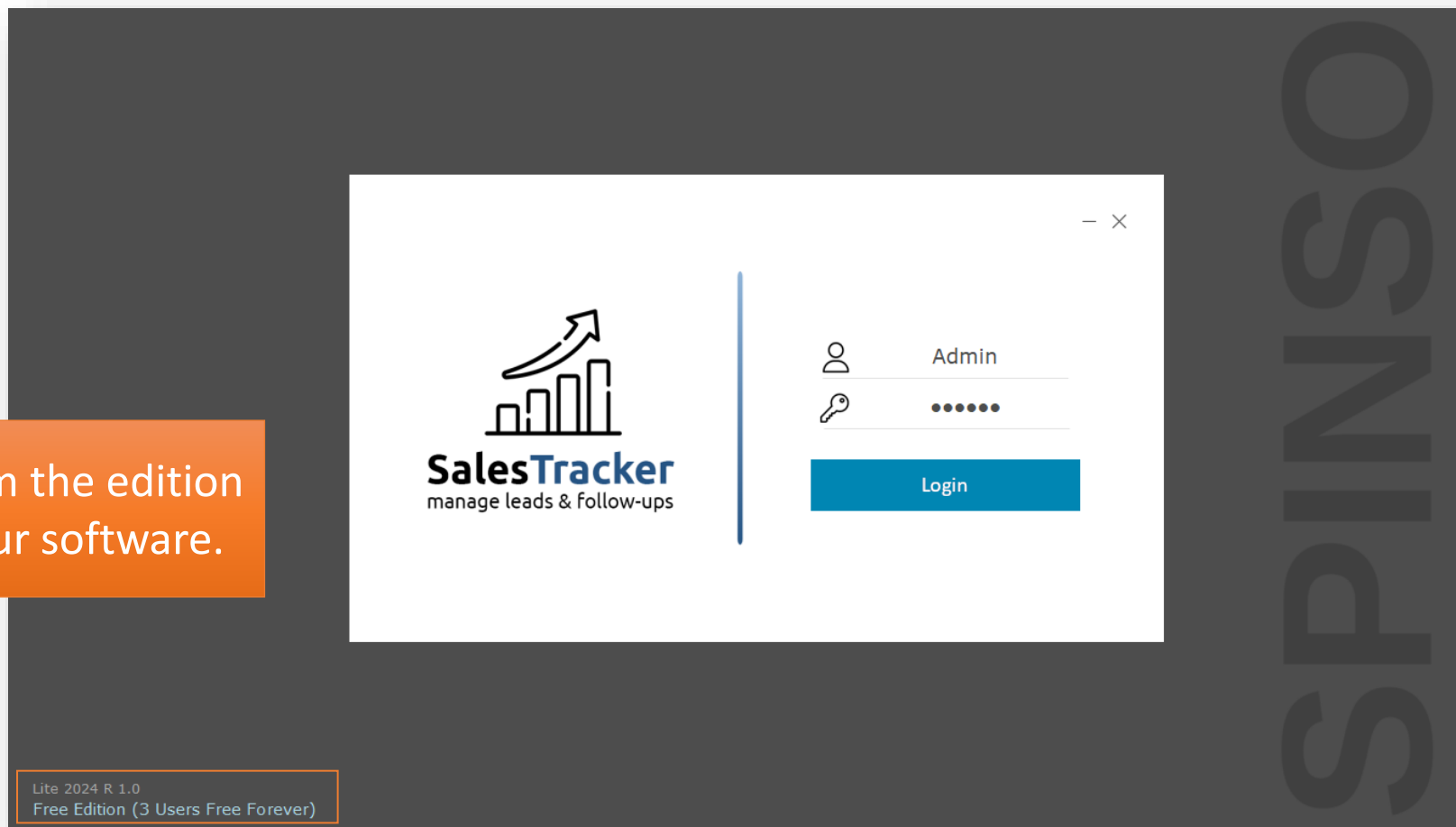
Open **SalesTracker** by double clicking on the desktop icon.

or



You can also launch the application from **Start - Program Files - Spinso - SalesTracker**

Login Screen

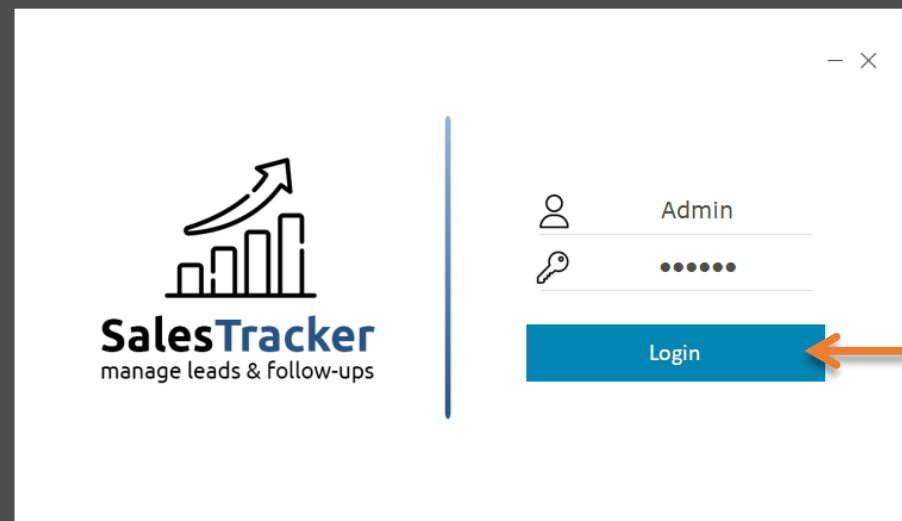


Check and confirm the edition
and version of our software.





Default login details:


- User Name : **admin**
- Password : **spinso**



— ×


SalesTracker
manage leads & follow-ups

 Admin



Login

Click on Login




Click on **“I Agree”**

Introduction to Wizard

- The wizard screen lets you quickly enter basic details required to create master's data like Employee and Product, etc. so that you can immediately start adding Leads.
- This screen will appear only once when you login to the system for first time.
- Data entered through wizard can be seen in Master screen. You can also further add or modify these details later in the respective master's screens.

SalesTracker



Welcome to startup wizard

This wizard will help you create basic master data for your organization
We strongly recommend you to follow each step carefully

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1

Click on “Next”

Admin's login details
👤

Login Name	<input type="text" value="spinso"/>
Password	<input type="password" value="•••••"/>
ReEnter Password	<input type="password" value="•••••"/>

Notes...

A default login and password for the user **admin** is already defined by the system. However you can change the credentials such as login name & password for the user **admin** here.

You can also later change these details or add more users from the following menu option
Master > Employee
To change the login details in Employee master go to **Login Tab**

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Here, change Admin's Name & Password if required.

Please note the new login name and password, since it will be used for next login


Then Click on **Next**

Business Type

Please Select Business Type

IT & Networking

- Airconditioning
- Cable & Internet Services
- CCTV & Security System
- Electronics & home appliances
- Elevators
- IT & Networking**
- Machinery & Equipments
- Medical Equipment
- Mobiles
- Office Automation
- Pest Control
- Rental & Refills
- Software
- Solar & Renewable Energy
- Water Purifiers
- Weighing machines
- Others

Notes... 

Sample Data
IT & Networking
Electronic & Home appliance

Select your business type listed in the drop-down. Selecting the appropriate business type will further give you list of relevant sample products, brand & its complaint type, so that you can quickly get started.

Note : Select "Others" If your **Business Type is not present** in the drop-down list

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- Select your Business type from the list.
- Choose **others** if the Business types mentioned doesn't meet your business type.

Business Type

Please Select Business Type

IT & Networking



Notes... 

Sample Data
IT & Networking
Electronic & Home appliance

Select your business type listed in the drop-down. Selecting the appropriate business type will further give you list of relevant sample products, brand & its complaint type, so that you can quickly get started.

Note : Select "Others" If your **Business Type is not present** in the drop-down list

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Click on "Next" to save the data

Employee (users)

Please enter Employee Name

Riya DSouza
Smith Anderson

* Enter each employee in a new line

Notes...

Please enter your employee details first name & last name as given below
John Smith
Rita Singh

You need to enter each employee name in a new line

In the above example by default **login name** and **password** assigned to John Smith would be john & rita respectively. However you have the option to change the login and password later from menu option **Master > Employee**

Note : By default **first name** would be used for Login and Password

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- Enter each Employee names, in new line.
- In SalesTracker Lite you get 3 user free license, including Admin user, hence now you can add up to 2 more Users.
- Click on “**Next**”

Product

Please Enter Product Name

All-in-one Printers
CCTV
Desktop
Inkjet Printers
Laptops
Laser Printers
Projector
Server
Software
Tablets

* Enter each product in a new line

Notes...

You can define the product here followed by the rate.

Each product should be added in a new line.


Later the product can be defined by the user having admin access through the following menu option
Master > Product

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- Enter Product for which you are entering Lead.
- Each product should be added in a new line
- Click on “**Next**”

SalesTracker



FINISH

We thank you for choosing SalesTracker

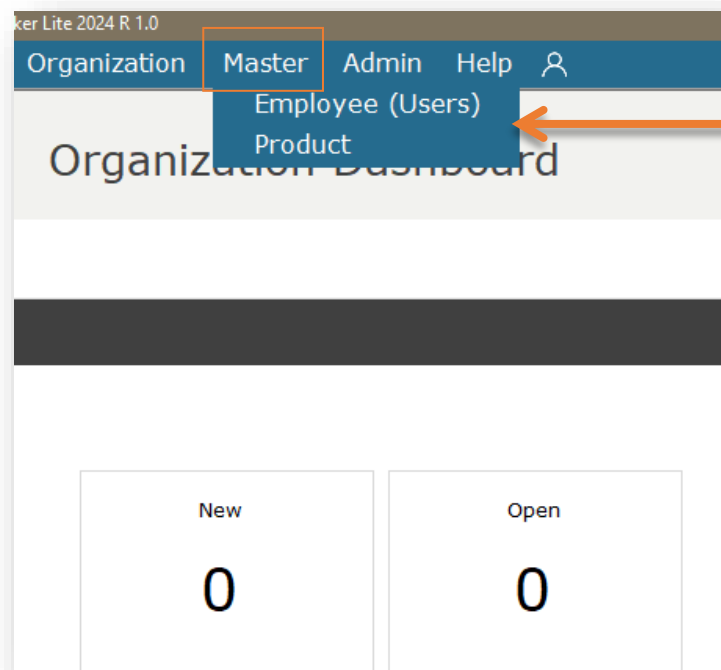
For free support during trial period you can mail us at trial@spino.com
After you click on finish the selected data would get generated into the system

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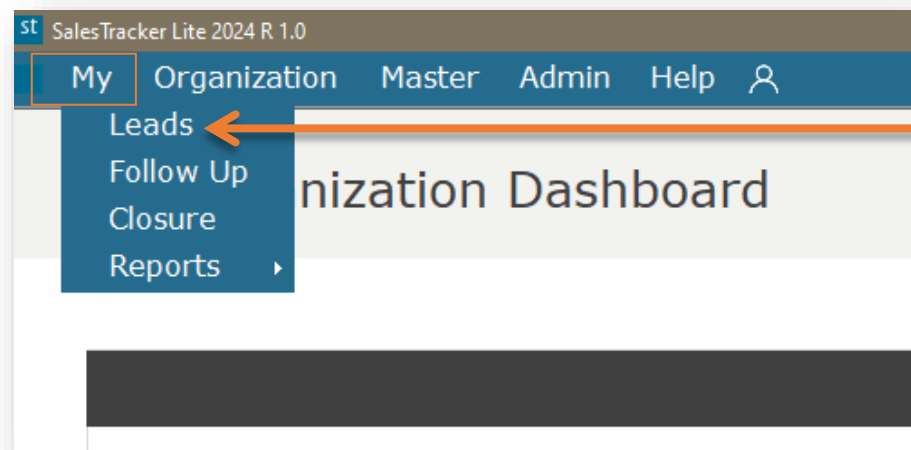
Click on **“Finish”**

Wizard is completed

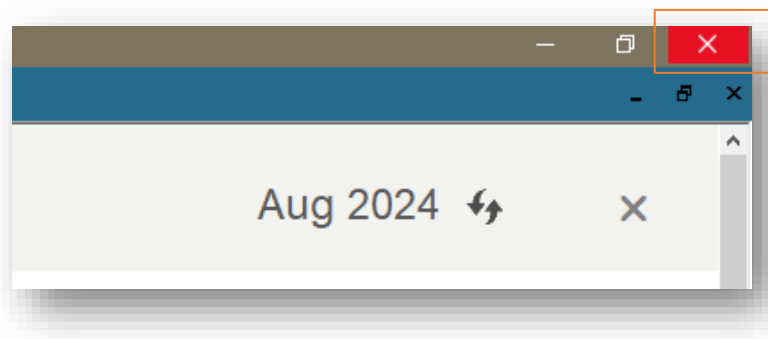


Note: If you wish to change or update wizard.

- Click on **Master → Employee**; to open Employee Screen, where you can edit employee's name or password.
- Click on **Master → Product**; to open Product Screen, where you can edit Product's name or price, etc.



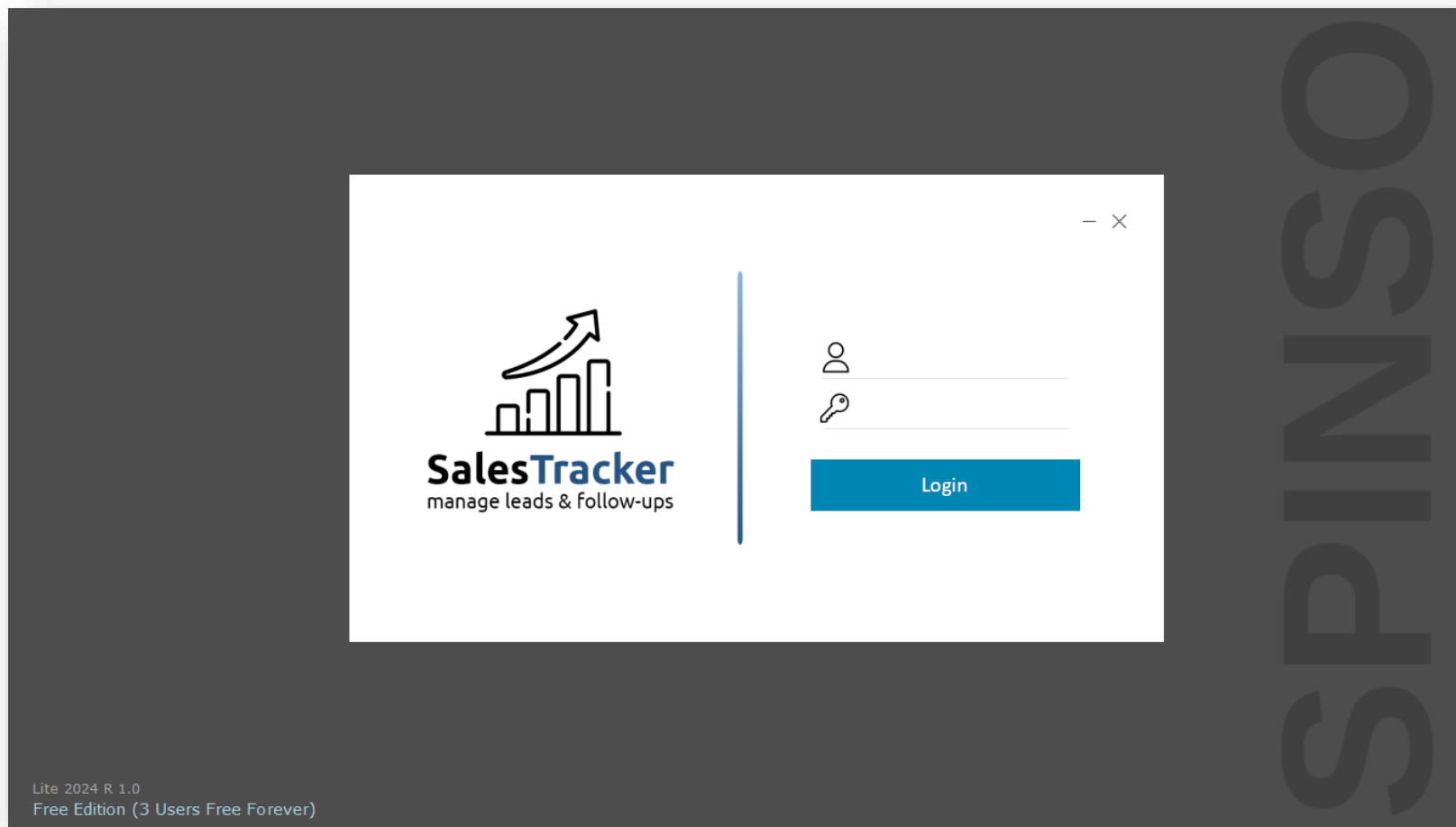
- Getting Started Process is Complete.
- You can immediately start adding Leads from **My → Leads**



Click on this exit button to close the application.

Re-login

The next time you login, use the new login name and password.



Thank You

We hope this was helpful. Kindly Call us or WhatsApp +91.99 201 401 00 for any queries, we are happy to help.

We recommend you to see our **First lead** Help file Next.

For more info visit: www.SPINSO.com