

**3** Free  
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# SPINSO<sup>®</sup>



Lite edition

## SalesTracker

Manage leads & follow-ups

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## Entering your first lead

Step by step guide to enter a lead in SalesTracker

# 1

# INDEX

## Steps

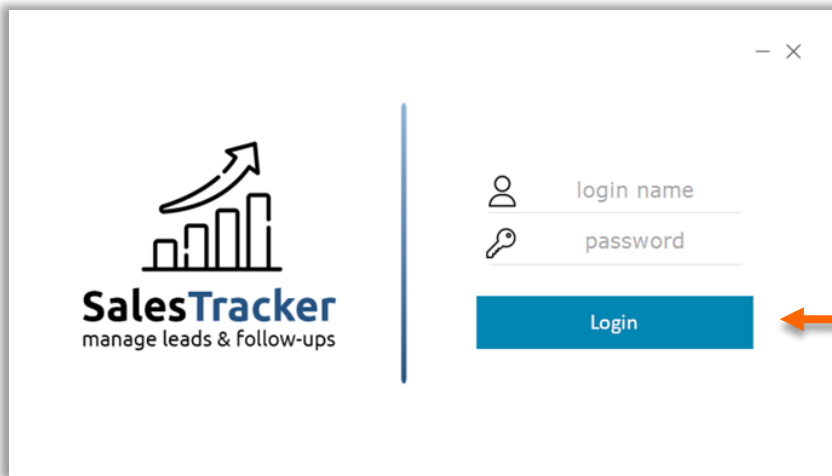
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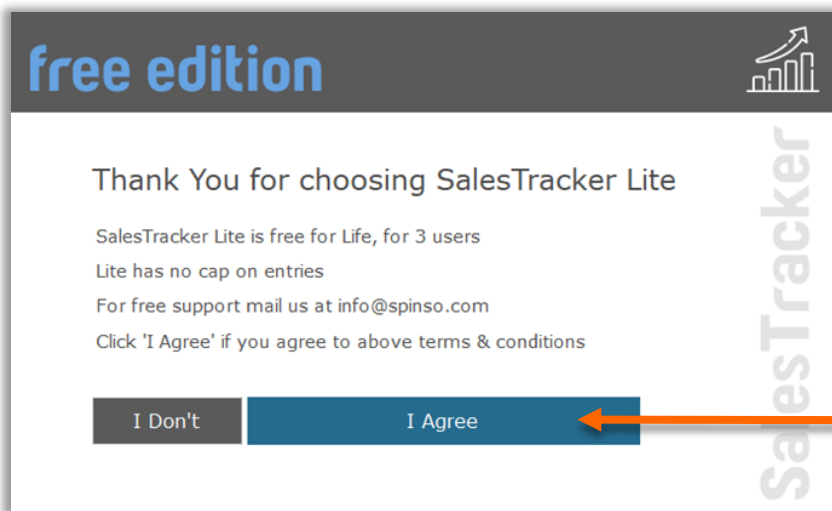
2

# Go To Lead Screen

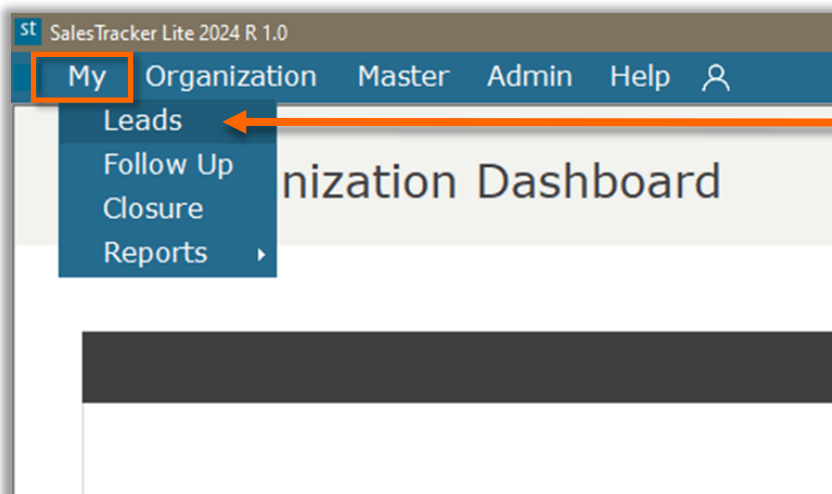
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Enter Login name and password  
Click on **Login**

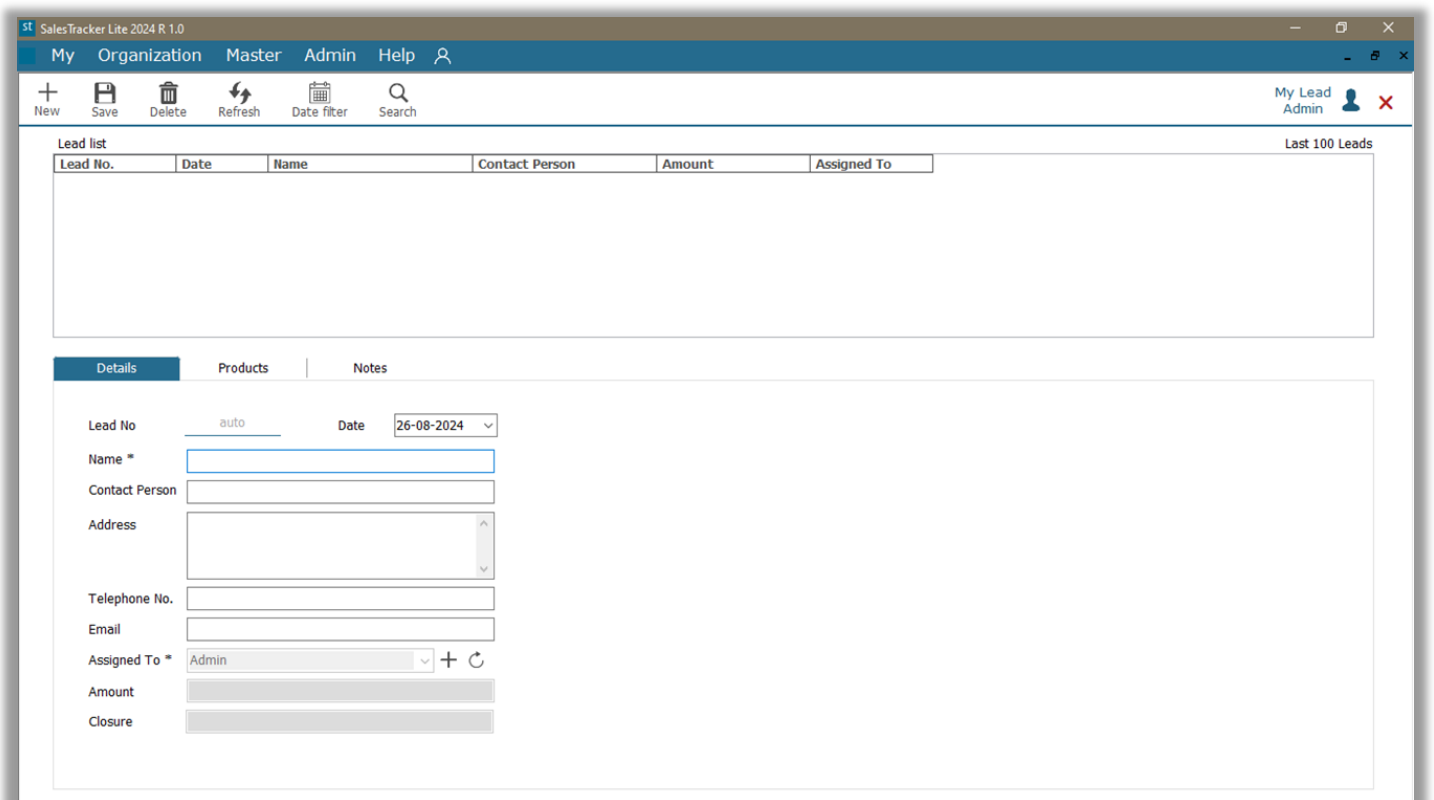


Click on **I Agree**



Go to  
**My > Leads**

# Lead Screen



The screenshot shows the 'Lead list' screen in SalesTracker Lite 2024 R. 1.0. The interface includes a top navigation bar with 'My', 'Organization', 'Master', 'Admin', and 'Help' menus. A toolbar below the navigation bar contains icons for 'New', 'Save', 'Delete', 'Refresh', 'Date filter', and 'Search'. The user is logged in as 'My Lead Admin'. The main area displays a table with columns for 'Lead No.', 'Date', 'Name', 'Contact Person', 'Amount', and 'Assigned To'. Below the table, there are tabs for 'Details', 'Products', and 'Notes'. The 'Details' tab is active, showing a form with the following fields: 'Lead No.' (set to 'auto'), 'Date' (set to '26-08-2024'), 'Name \*', 'Contact Person', 'Address', 'Telephone No.', 'Email', 'Assigned To \*' (set to 'Admin'), 'Amount', and 'Closure'.

Lead No.	Date	Name	Contact Person	Amount	Assigned To

**Details** | Products | Notes

Lead No. auto      Date 26-08-2024

Name \*

Contact Person

Address

Telephone No.

Email

Assigned To \* Admin

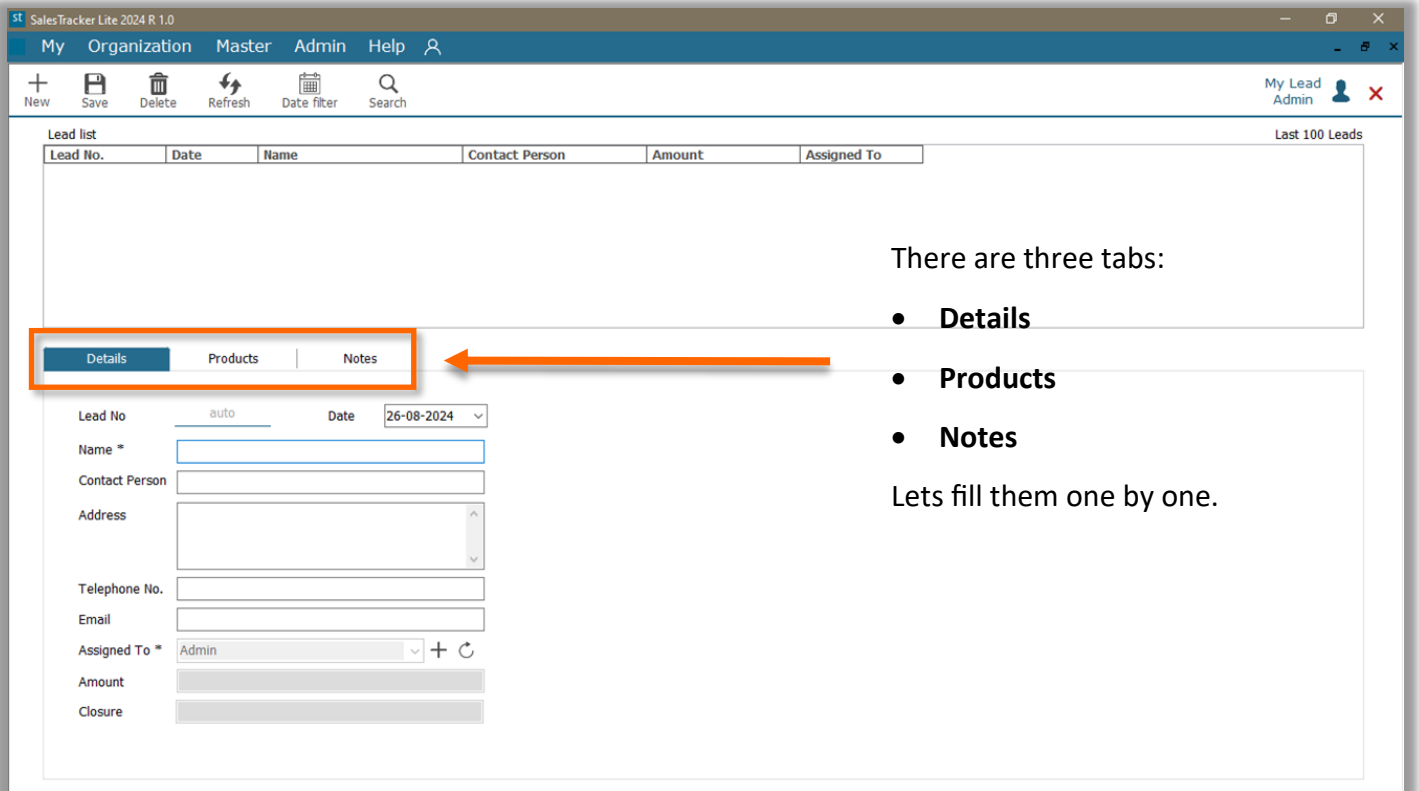
Amount

Closure

**3**

# Entering a Lead

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Lead list Last 100 Leads

Lead No.	Date	Name	Contact Person	Amount	Assigned To

Details
Products
Notes

Lead No  Date

Name \*

Contact Person

Address

Telephone No.

Email

Assigned To \*  + ↻

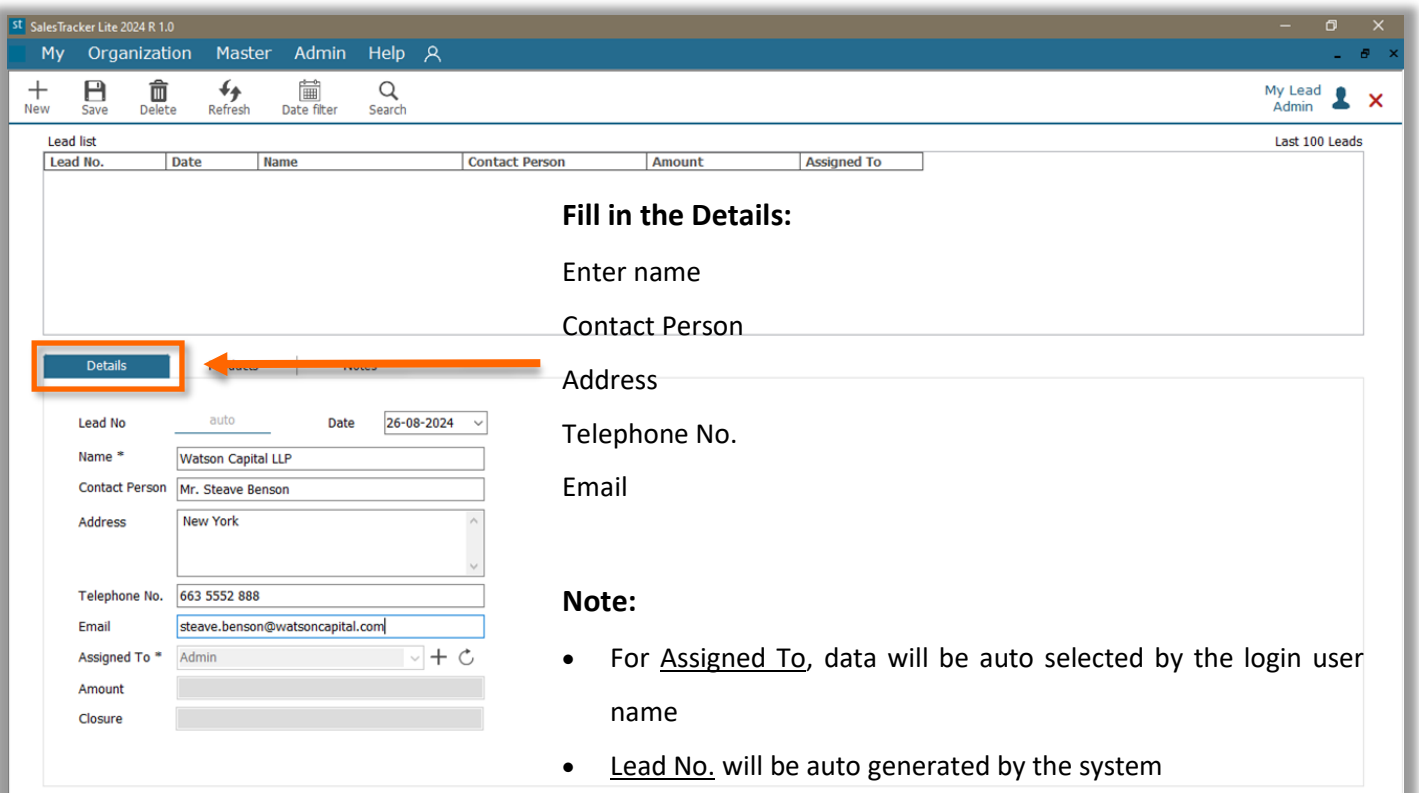
Amount

Closure

There are three tabs:

- **Details**
- **Products**
- **Notes**

Lets fill them one by one.



Lead list Last 100 Leads

Lead No.	Date	Name	Contact Person	Amount	Assigned To

Details
Products
Notes

Lead No  Date

Name \*

Contact Person

Address

Telephone No.

Email

Assigned To \*  + ↻

Amount

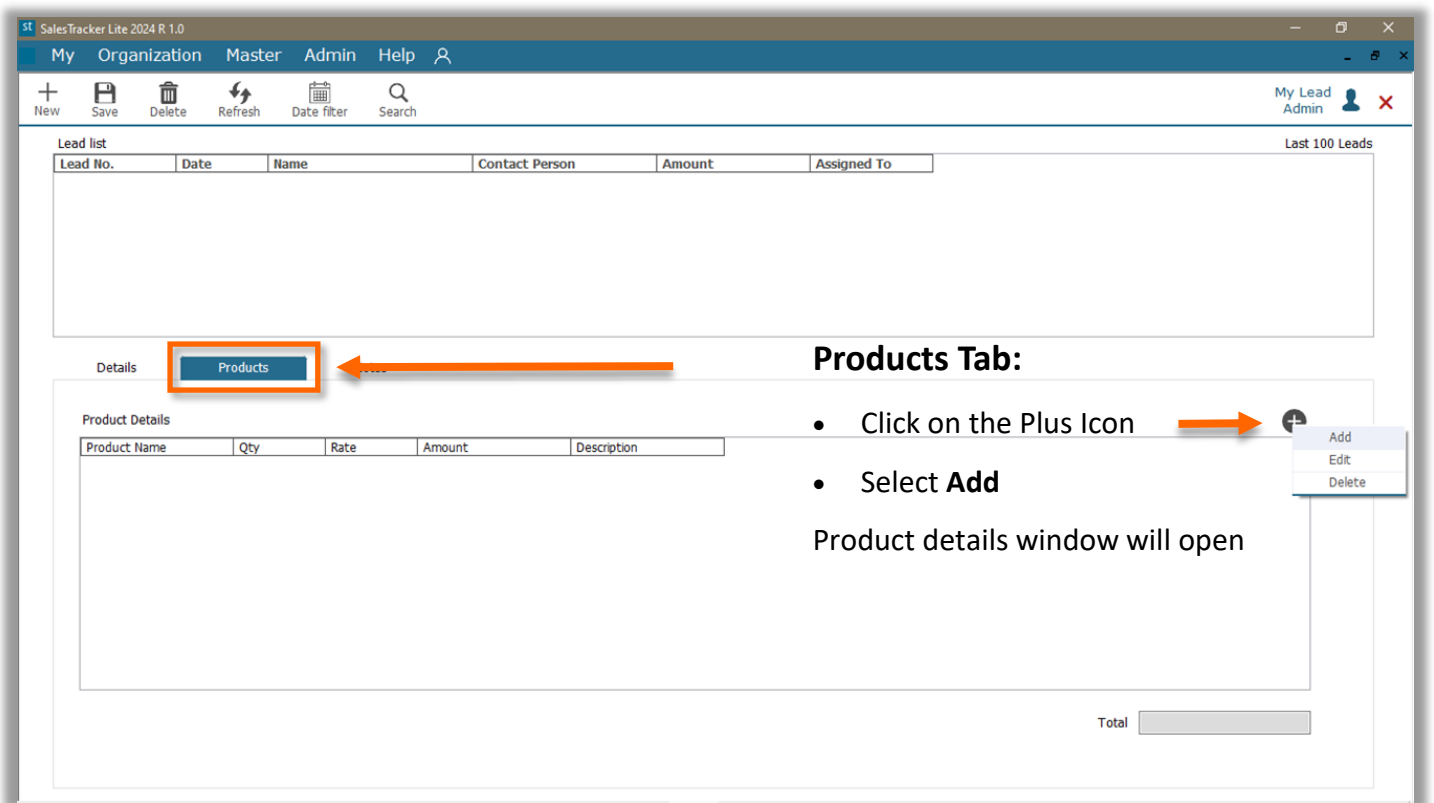
Closure

**Fill in the Details:**

Enter name  
 Contact Person  
 Address  
 Telephone No.  
 Email

**Note:**

- For Assigned To, data will be auto selected by the login user name
- Lead No. will be auto generated by the system



Lead list

Lead No.	Date	Name	Contact Person	Amount	Assigned To

Details

**Products**

Product Details

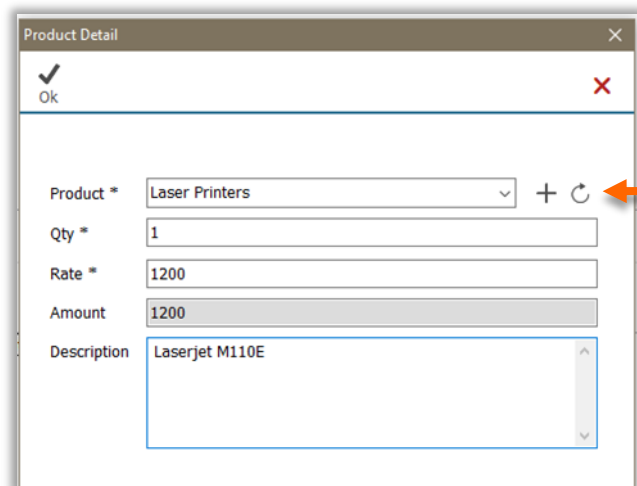
Product Name	Qty	Rate	Amount	Description

Total

**Products Tab:**

- Click on the Plus Icon
- Select **Add**

Product details window will open



Product Detail

✓ Ok ✗

Product \* Laser Printers + ↻

Qty \* 1

Rate \* 1200

Amount 1200

Description Laserjet M110E

**Product Details:**

- Select Product
- Quantity
- Rate
- Amount will be auto calculated.
- Enter any notes or description for the product

Click on **Ok** to save



SalesTracker Lite 2024 R. 1.0

My Organization Master Admin Help

New Save Delete Refresh Date filter Search

My Lead Admin

Lead list Last 100 Leads

Lead No.	Date	Name	Contact Person	Amount	Assigned To

Details Products Notes

Product Details

Product Name	Qty	Rate	Amount	Description
Laser Printers	1	1200	1200	Laserjet M110E

To add multiple Products click on the plus icon > Select **Add**. Repeat the same process.

Total 1200

SalesTracker Lite 2024 R. 1.0

My Organization Master Admin Help

New Save Delete Refresh Date filter Search

My Lead Admin

Lead list Last 100 Leads

Lead No.	Date	Name	Contact Person	Amount	Assigned To

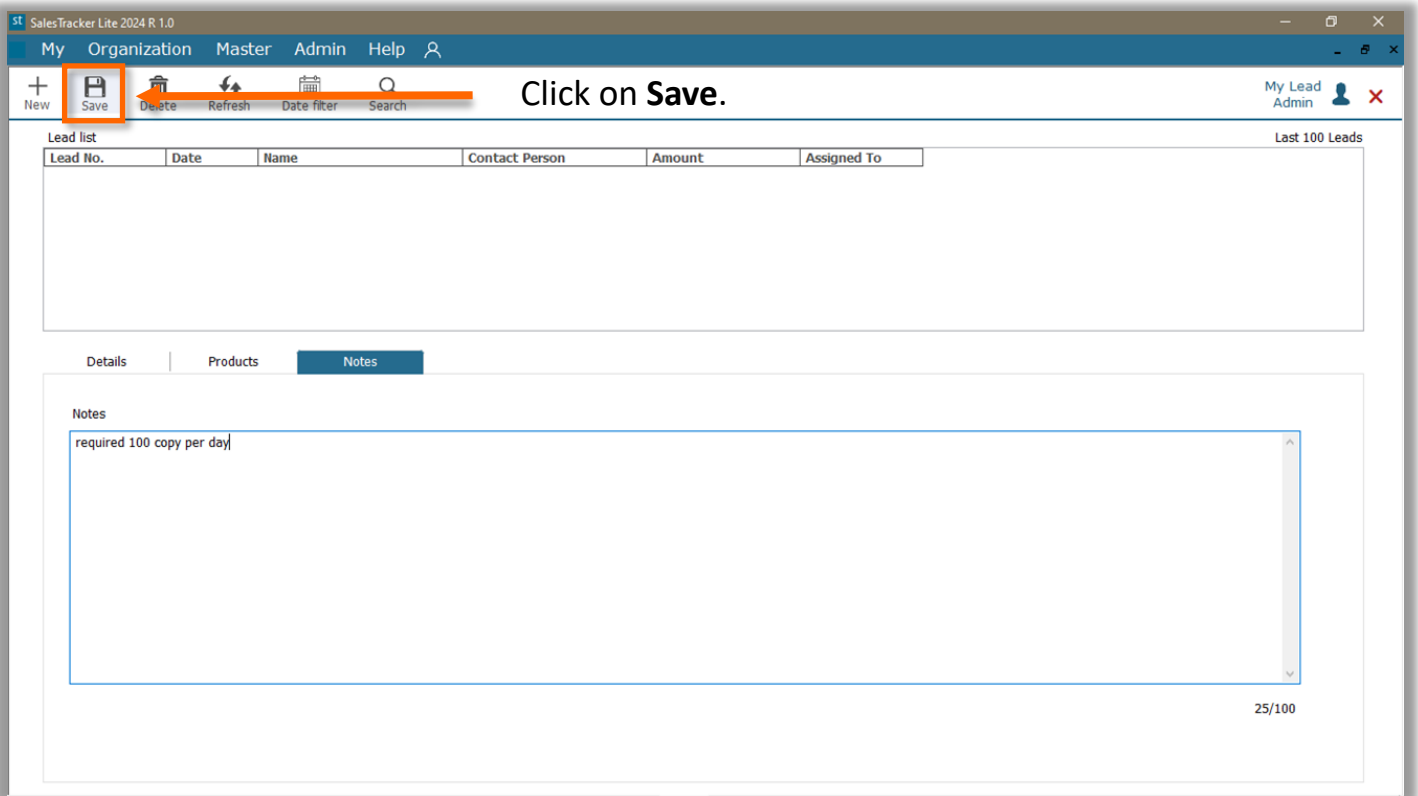
Details Products Notes

Notes

required 100 copy per day

**Notes Tab:**  
Enter any notes or Remarks here.

25/100



ST SalesTracker Lite 2024 R 1.0

My Organization Master Admin Help

New Save Delete Refresh Date filter Search

Click on **Save**.

My Lead Admin

Lead list Last 100 Leads

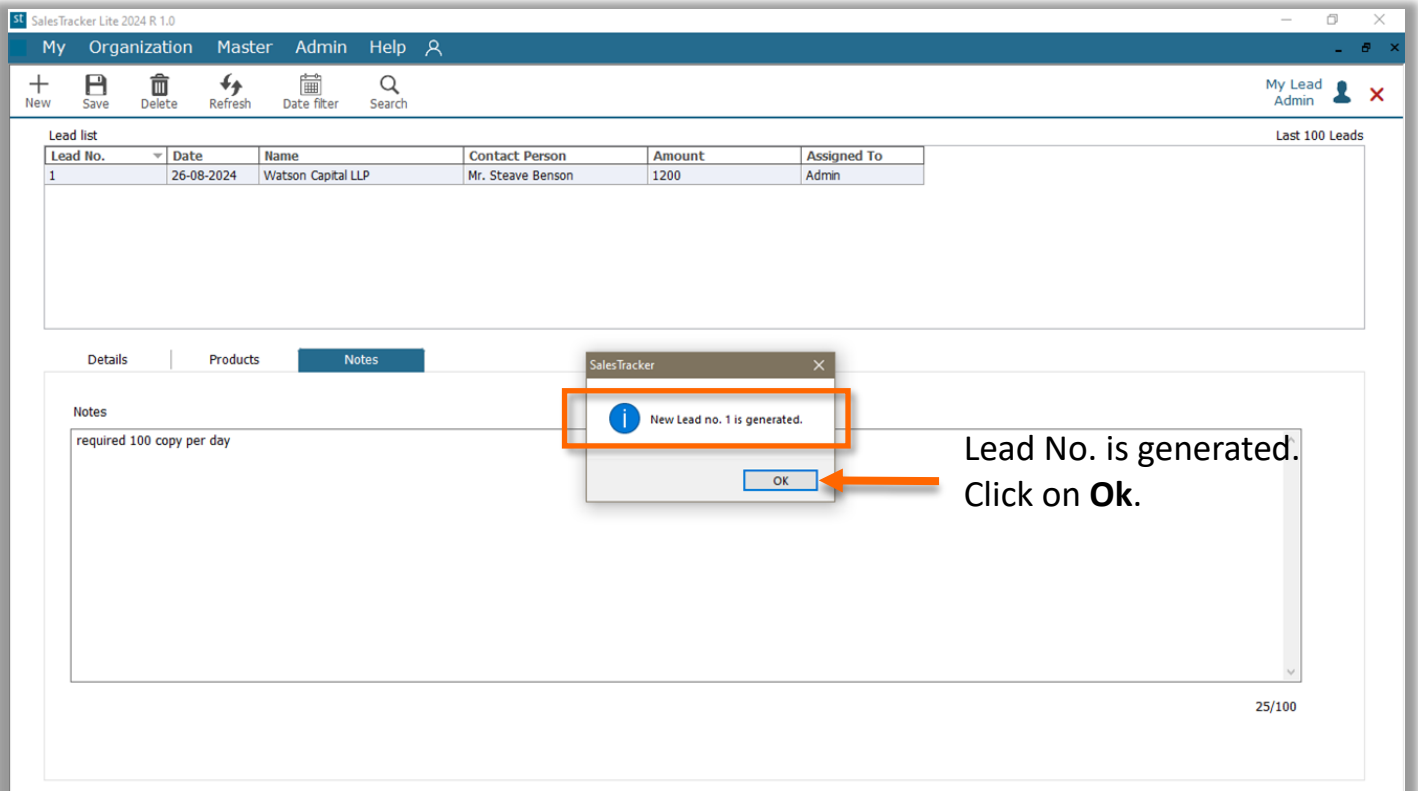
Lead No.	Date	Name	Contact Person	Amount	Assigned To
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Details Products Notes

Notes

required 100 copy per day

25/100



ST SalesTracker Lite 2024 R 1.0

My Organization Master Admin Help

New Save Delete Refresh Date filter Search

My Lead Admin

Lead list Last 100 Leads

Lead No.	Date	Name	Contact Person	Amount	Assigned To
1	26-08-2024	Watson Capital LLP	Mr. Steave Benson	1200	Admin

Details Products Notes

Notes

required 100 copy per day

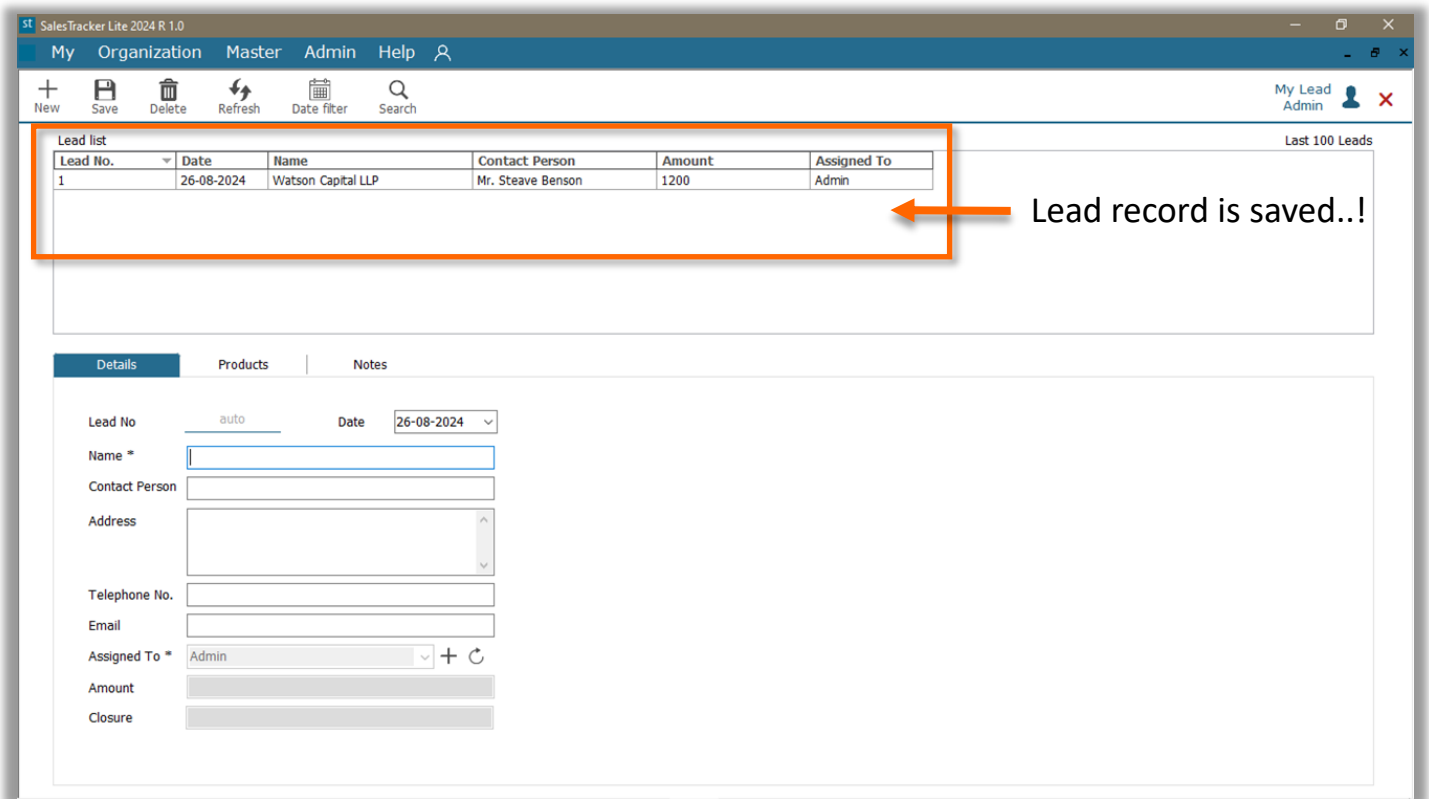
25/100

SalesTracker

New Lead no. 1 is generated.

OK

Lead No. is generated. Click on **Ok**.



The screenshot displays the SalesTracker Lite 2024 R 1.0 application window. The top navigation bar includes 'My', 'Organization', 'Master', 'Admin', and 'Help'. Below this is a toolbar with icons for 'New', 'Save', 'Delete', 'Refresh', 'Date filter', and 'Search'. The user profile 'My Lead Admin' is visible in the top right corner.

The main content area features a 'Lead list' table with the following data:

Lead No.	Date	Name	Contact Person	Amount	Assigned To
1	26-08-2024	Watson Capital LLP	Mr. Steave Benson	1200	Admin

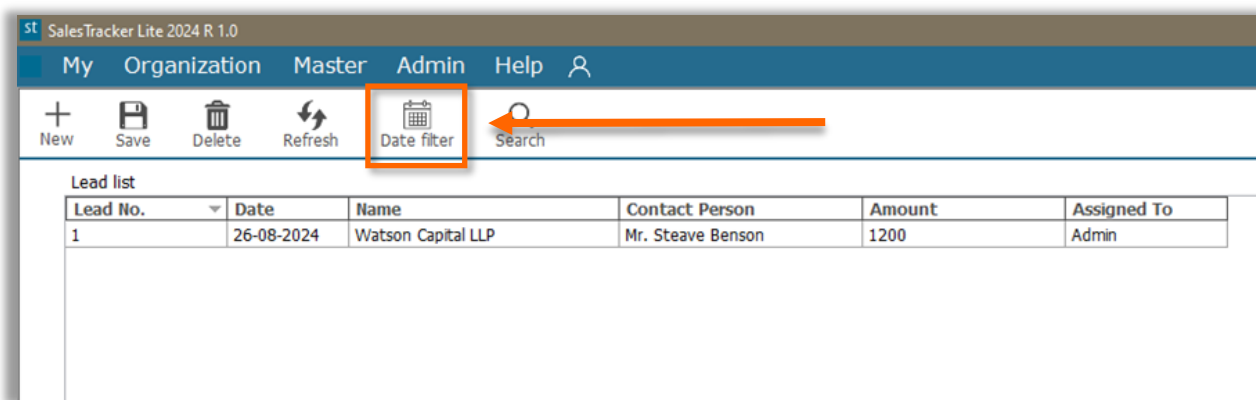
An orange box highlights the table, and an orange arrow points to the text 'Lead record is saved..!' on the right side of the table.

Below the table, there are tabs for 'Details', 'Products', and 'Notes'. The 'Details' tab is active, showing a form with the following fields:

- Lead No: auto
- Date: 26-08-2024
- Name \*
- Contact Person
- Address
- Telephone No.
- Email
- Assigned To \* Admin
- Amount
- Closure

## 4

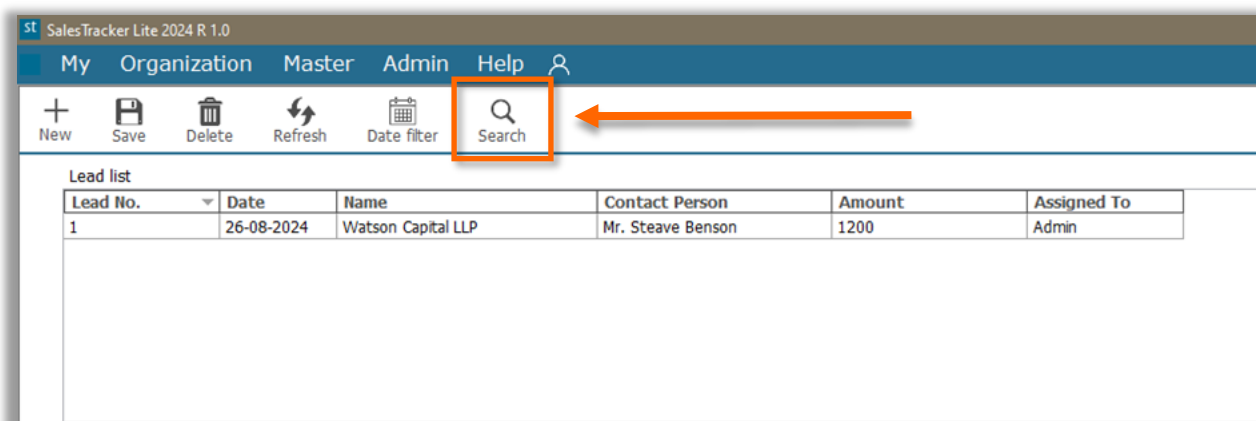
# Additional Information



The screenshot shows the SalesTracker Lite 2024 R 1.0 interface. The top navigation bar includes 'My', 'Organization', 'Master', 'Admin', and 'Help'. Below the navigation bar is a toolbar with icons for 'New', 'Save', 'Delete', 'Refresh', 'Date filter', and 'Search'. The 'Date filter' icon, which is a calendar, is highlighted with an orange box. An orange arrow points from the 'Date filter' icon to the 'Search' icon. Below the toolbar is a table titled 'Lead list' with the following data:

Lead No.	Date	Name	Contact Person	Amount	Assigned To
1	26-08-2024	Watson Capital LLP	Mr. Steave Benson	1200	Admin

**Date Filter:**  
Filter the Leads record by date



The screenshot shows the SalesTracker Lite 2024 R 1.0 interface. The top navigation bar includes 'My', 'Organization', 'Master', 'Admin', and 'Help'. Below the navigation bar is a toolbar with icons for 'New', 'Save', 'Delete', 'Refresh', 'Date filter', and 'Search'. The 'Search' icon, which is a magnifying glass, is highlighted with an orange box. An orange arrow points from the 'Search' icon to the left. Below the toolbar is a table titled 'Lead list' with the following data:

Lead No.	Date	Name	Contact Person	Amount	Assigned To
1	26-08-2024	Watson Capital LLP	Mr. Steave Benson	1200	Admin

**Search:**  
Search/find records by Name from the Lead list.

# SPINSO<sup>o</sup>

# Thank you

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

We recommend you to see our **Entering Your first Follow Up** Help file Next.

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