

3 Free
users
for life

SPINSO[®]



Lite edition

SalesTracker

Manage leads & follow-ups



Close your Lead

Step by step guide to close a lead in SalesTracker

1

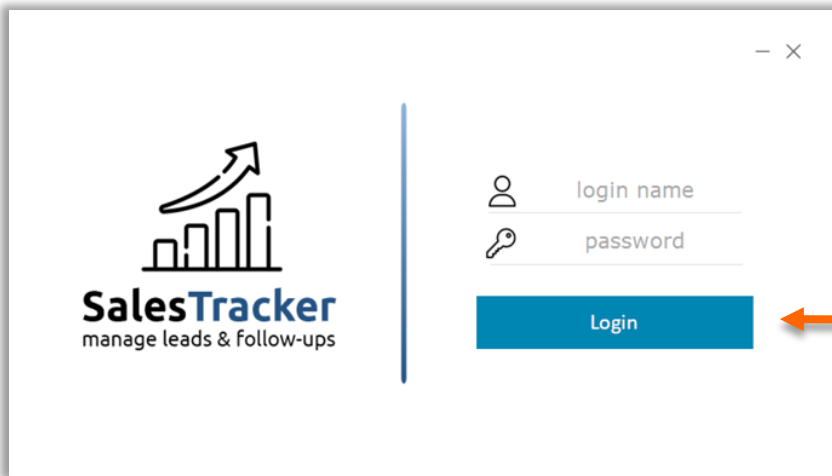
INDEX

Steps

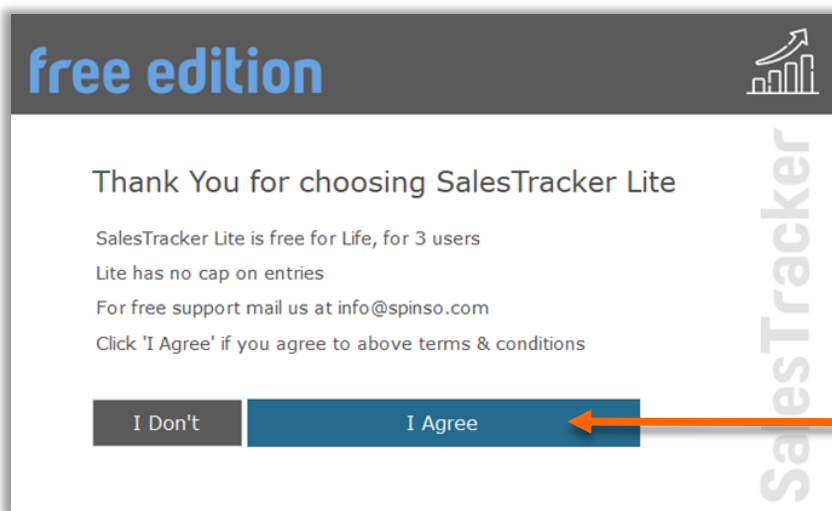
1. Index _____ Pg 2
2. Go To Closure Screen _____ Pg 3
3. Close a Lead _____ Pg 6
4. Additional Information _____ Pg 12

2

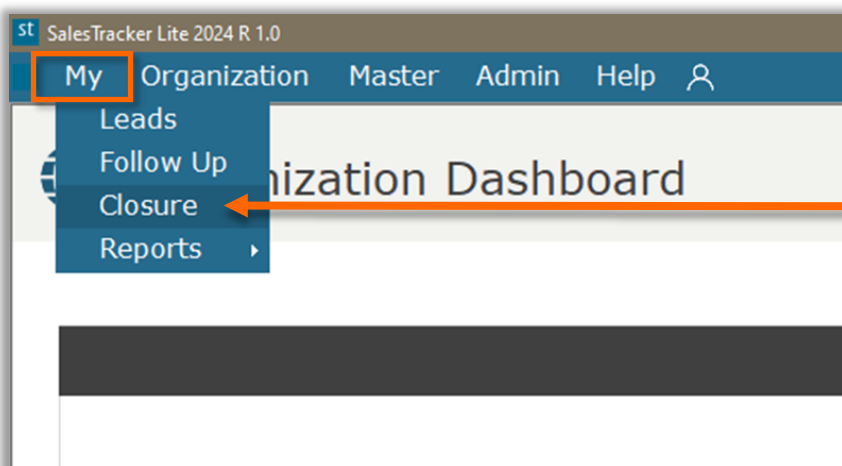
Go To Closure Screen



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

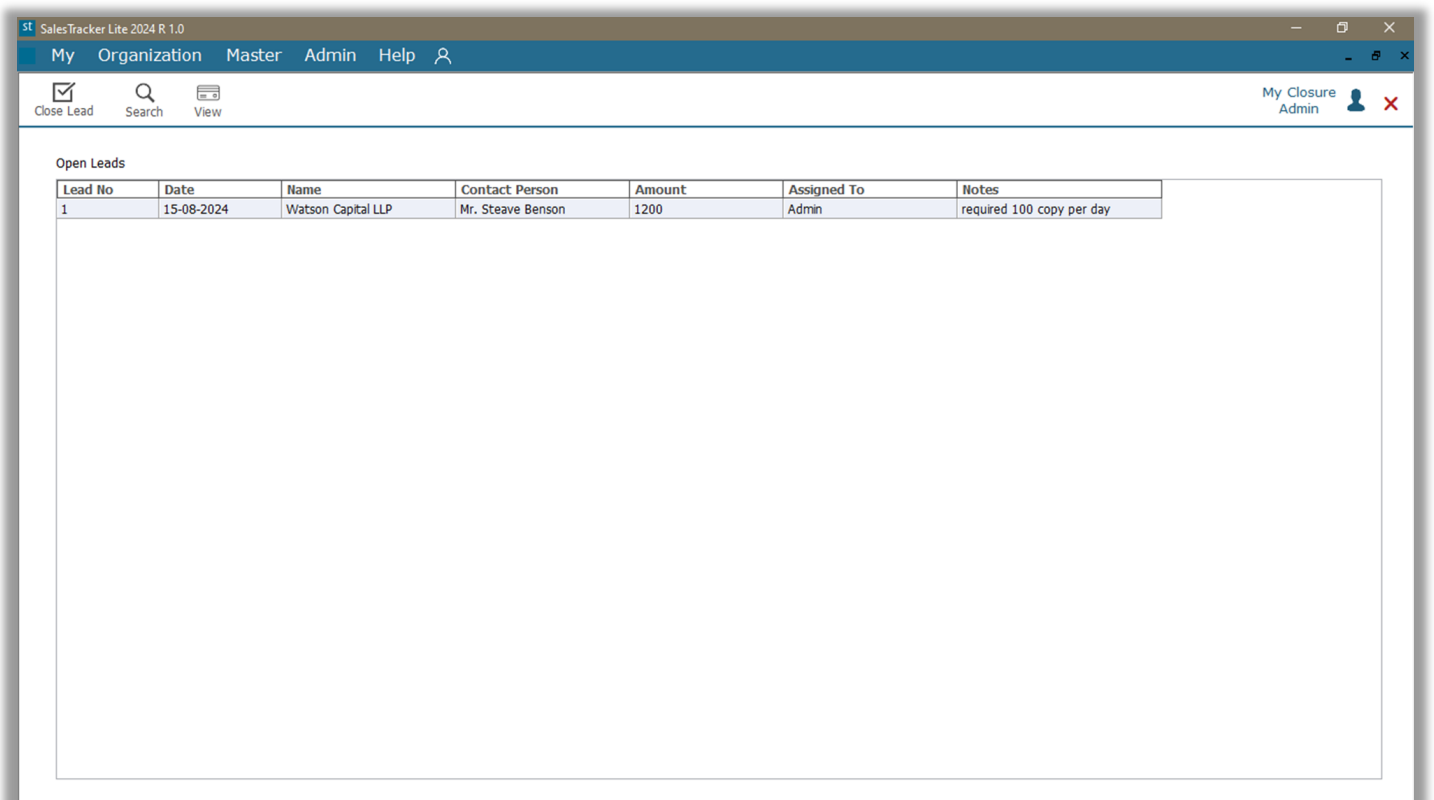


Click on **I Agree**



Go to
My > Closure

Closure Screen

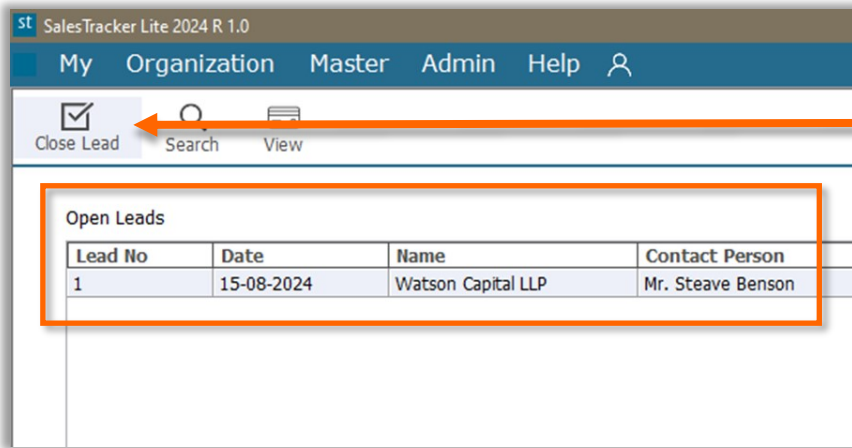


The screenshot shows the 'Closure Screen' in SalesTracker Lite 2024 R 1.0. The window title is 'SalesTracker Lite 2024 R 1.0'. The menu bar includes 'My', 'Organization', 'Master', 'Admin', and 'Help'. The toolbar contains 'Close Lead', 'Search', and 'View'. The user is logged in as 'My Closure Admin'. The main area is titled 'Open Leads' and contains a table with the following data:

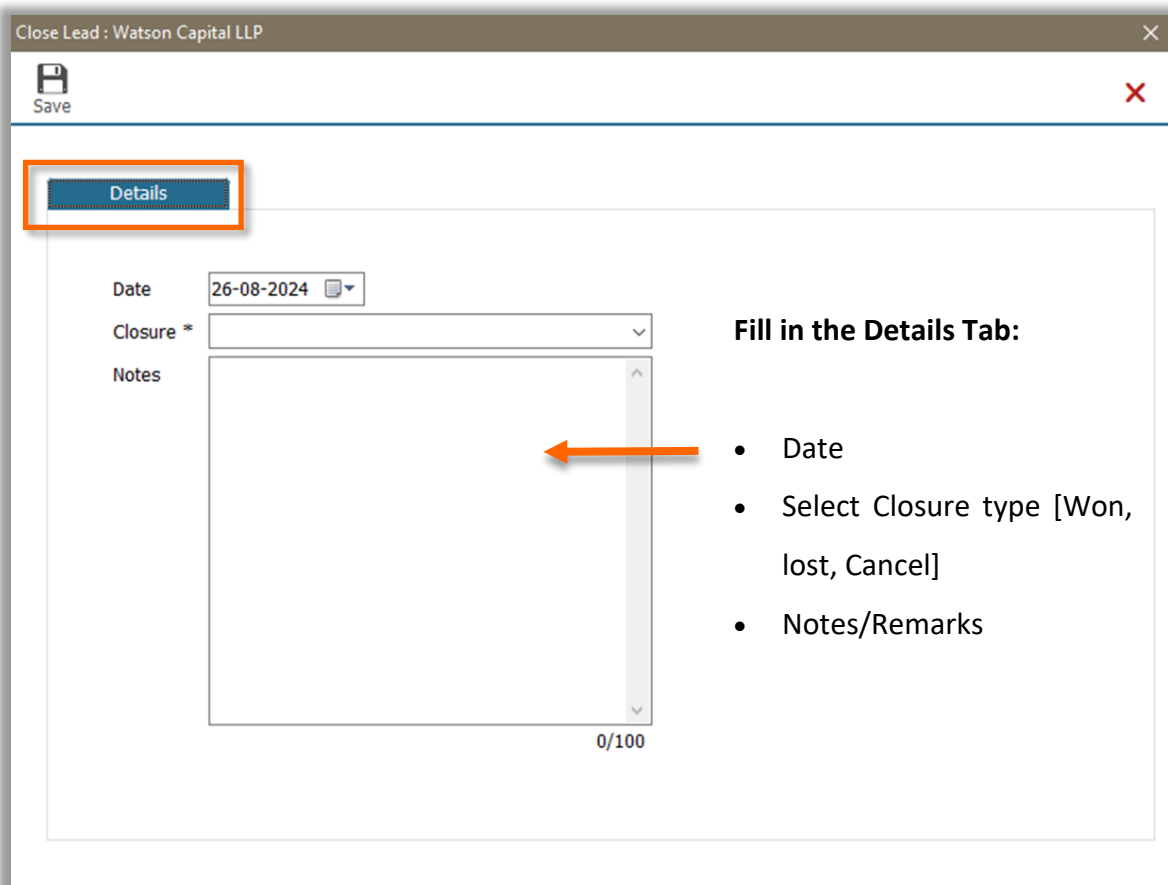
Lead No	Date	Name	Contact Person	Amount	Assigned To	Notes
1	15-08-2024	Watson Capital LLP	Mr. Steave Benson	1200	Admin	required 100 copy per day

3

Close a Lead



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



Close Lead : Watson Capital LLP

Save

Details **Products**

Date: 26-08-2024

Closure * **Won**

Notes: 10% discount given

18/100

Since we selected Won in Closure, Product Tab is Active

Close Lead : Watson Capital LLP

Save

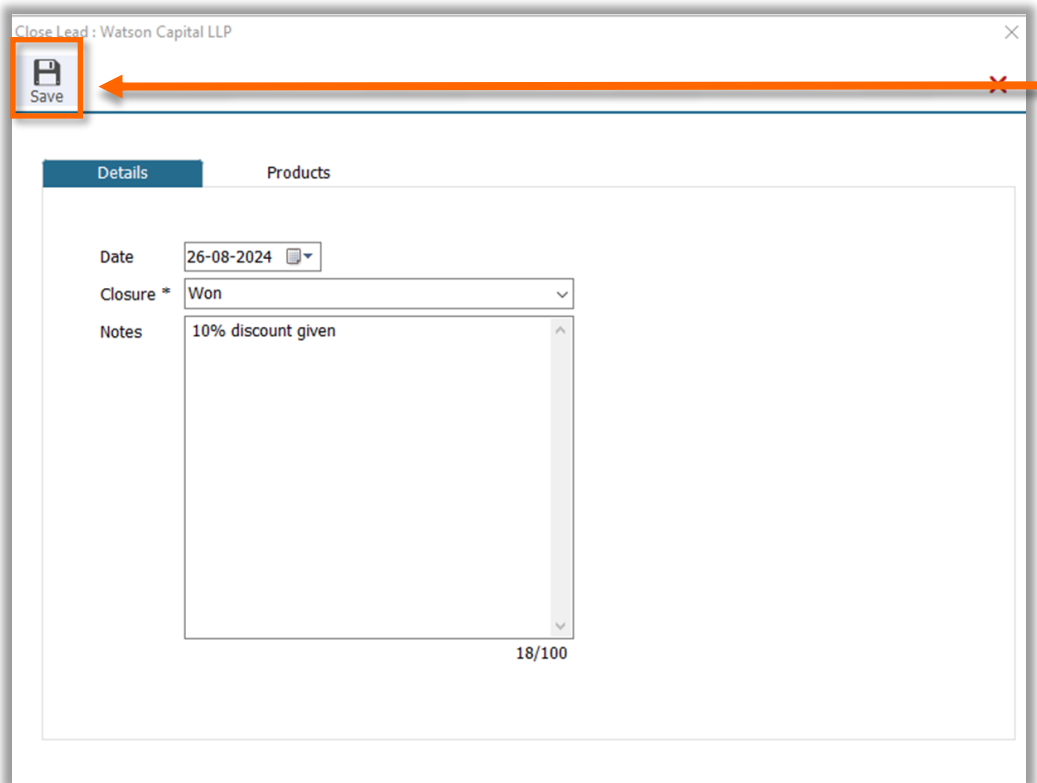
Details **Products**

Product Details

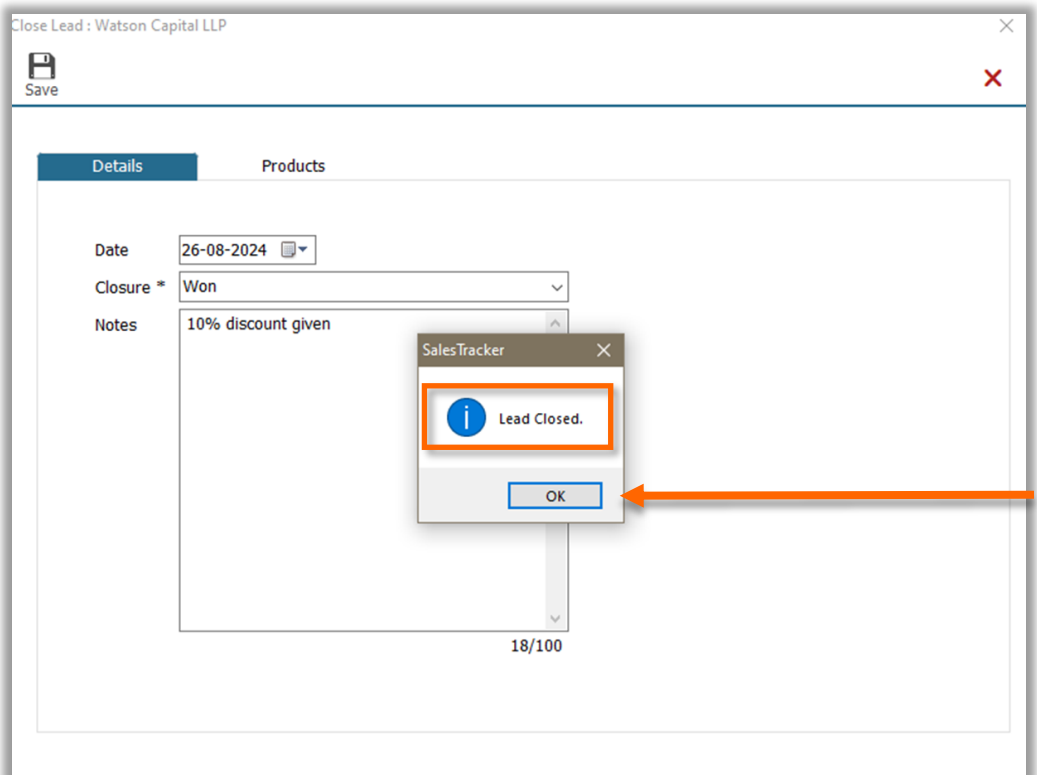
Product Name	Qty	Rate	Amount	Description
Laser Printers	1	1200	1200	Laserjet M110E

Total Amount: 1200

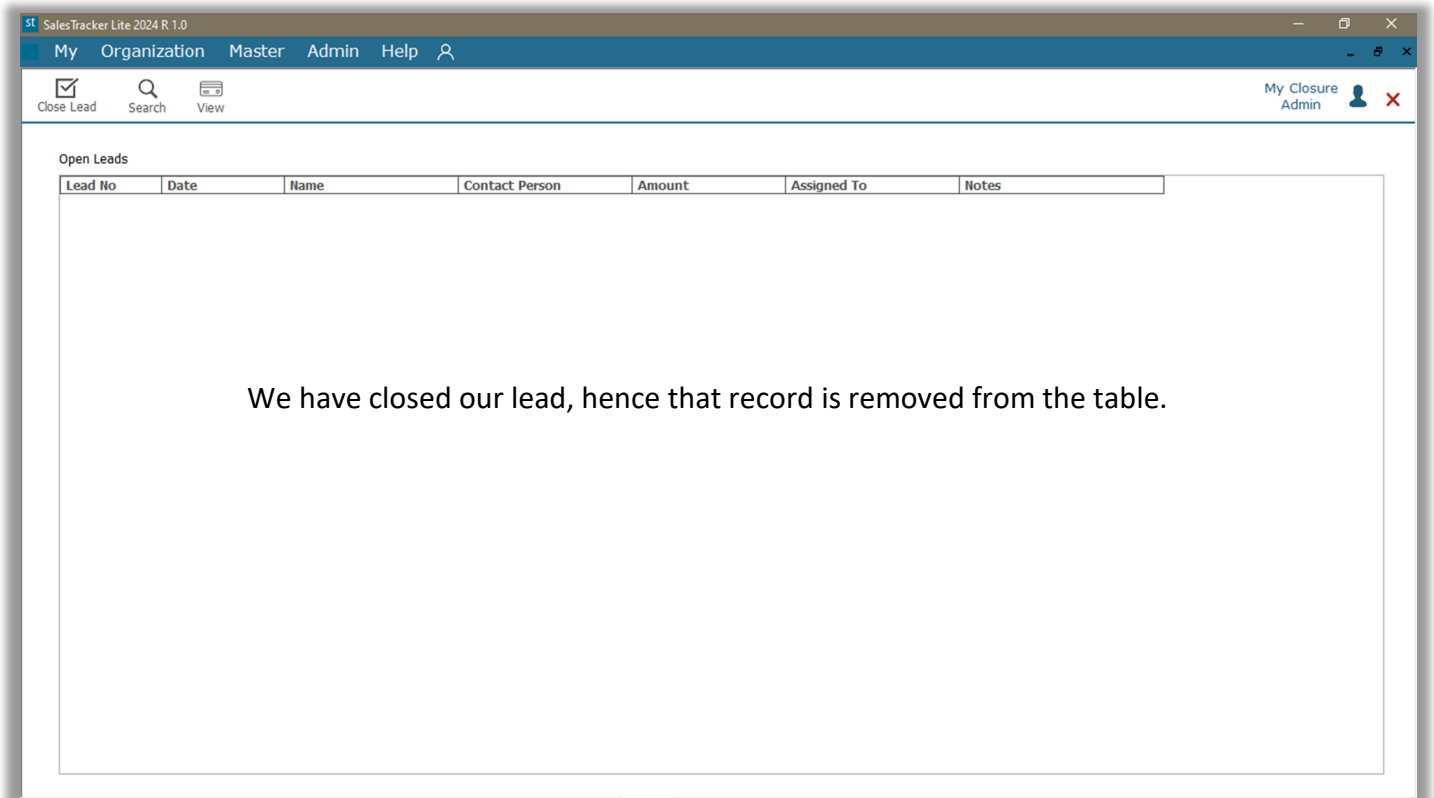
We can see lead product list here.



Click on **Save**.



Congratulations, you have closed your first Lead Successfully. Click on **OK**.



The screenshot shows the SalesTracker Lite 2024 R 1.0 application window. The title bar reads "SalesTracker Lite 2024 R 1.0". The menu bar includes "My", "Organization", "Master", "Admin", and "Help". The toolbar contains "Close Lead", "Search", and "View" icons. The user profile "My Closure Admin" is visible in the top right. The main content area is titled "Open Leads" and contains a table with the following headers: "Lead No", "Date", "Name", "Contact Person", "Amount", "Assigned To", and "Notes". The table is currently empty, and a message is displayed in the center: "We have closed our lead, hence that record is removed from the table."

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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>