SPINSO

Lite edition

SalesTracker
Manage leads & follow-ups

How To View Reports
Step by step guide to view reports in SalesTracker

1 INDEX

Steps
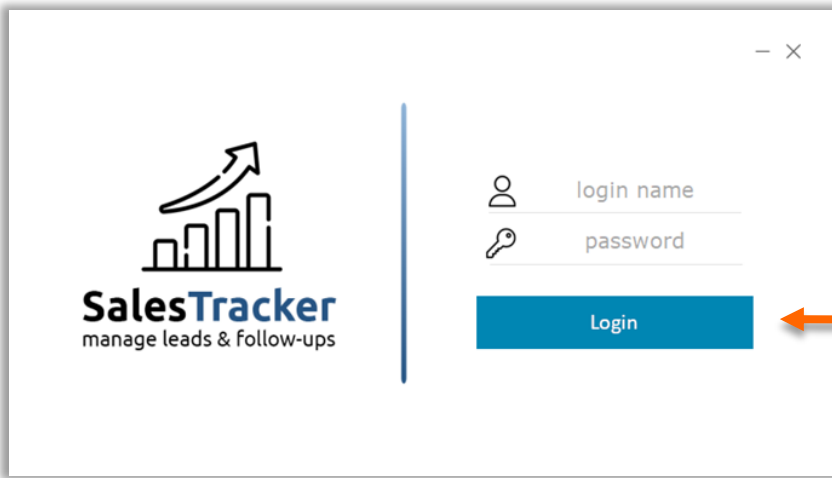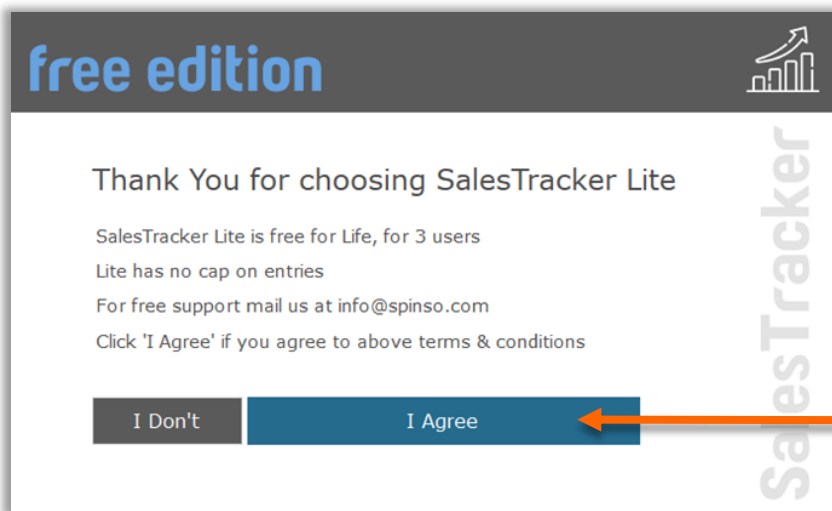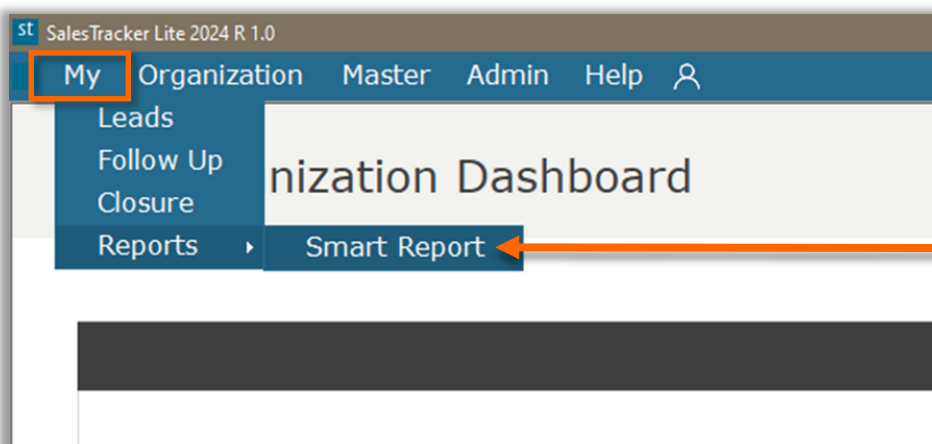
2

Go To Smart Report Screen
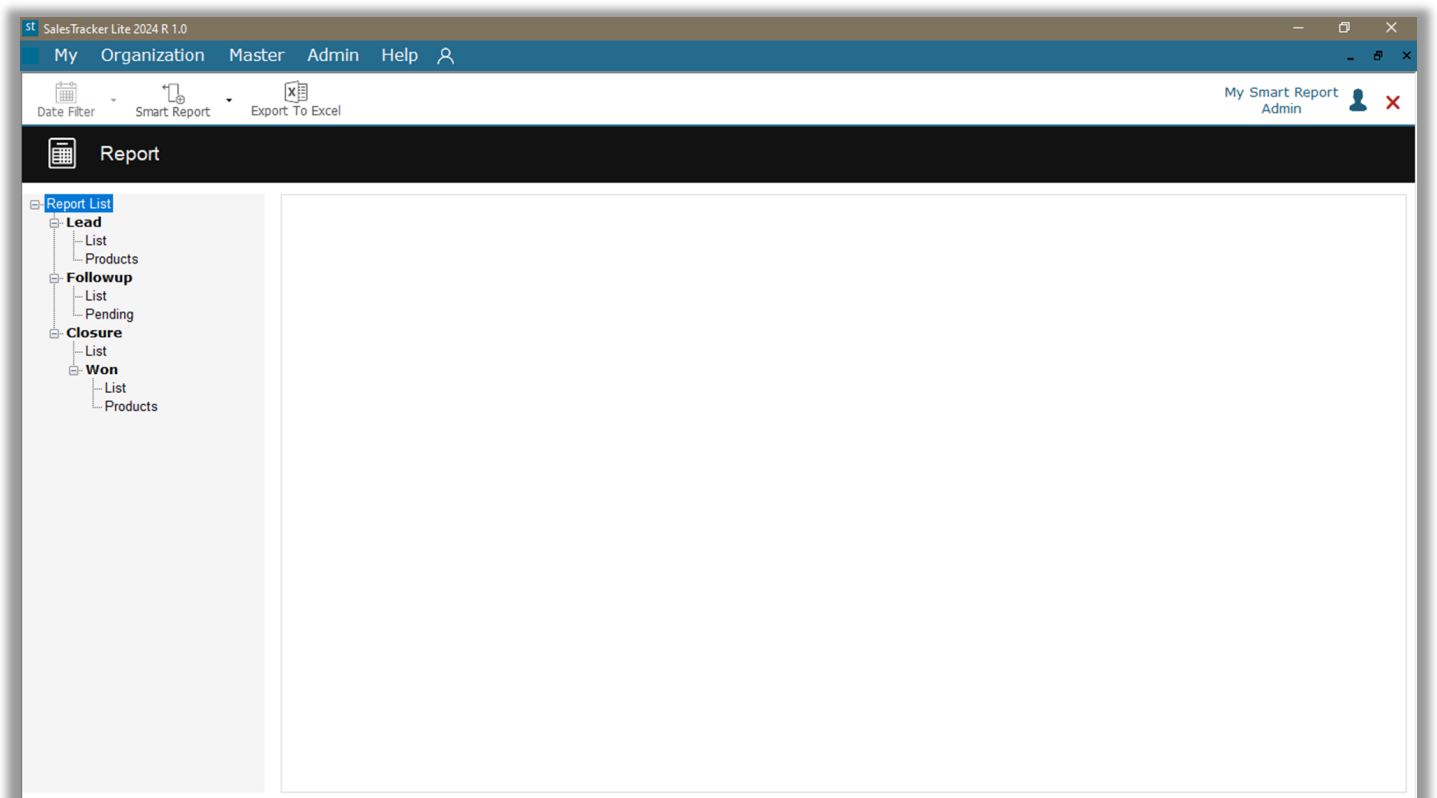
Enter Login name and password

Click on **Login**

Click on **I Agree**

Go to
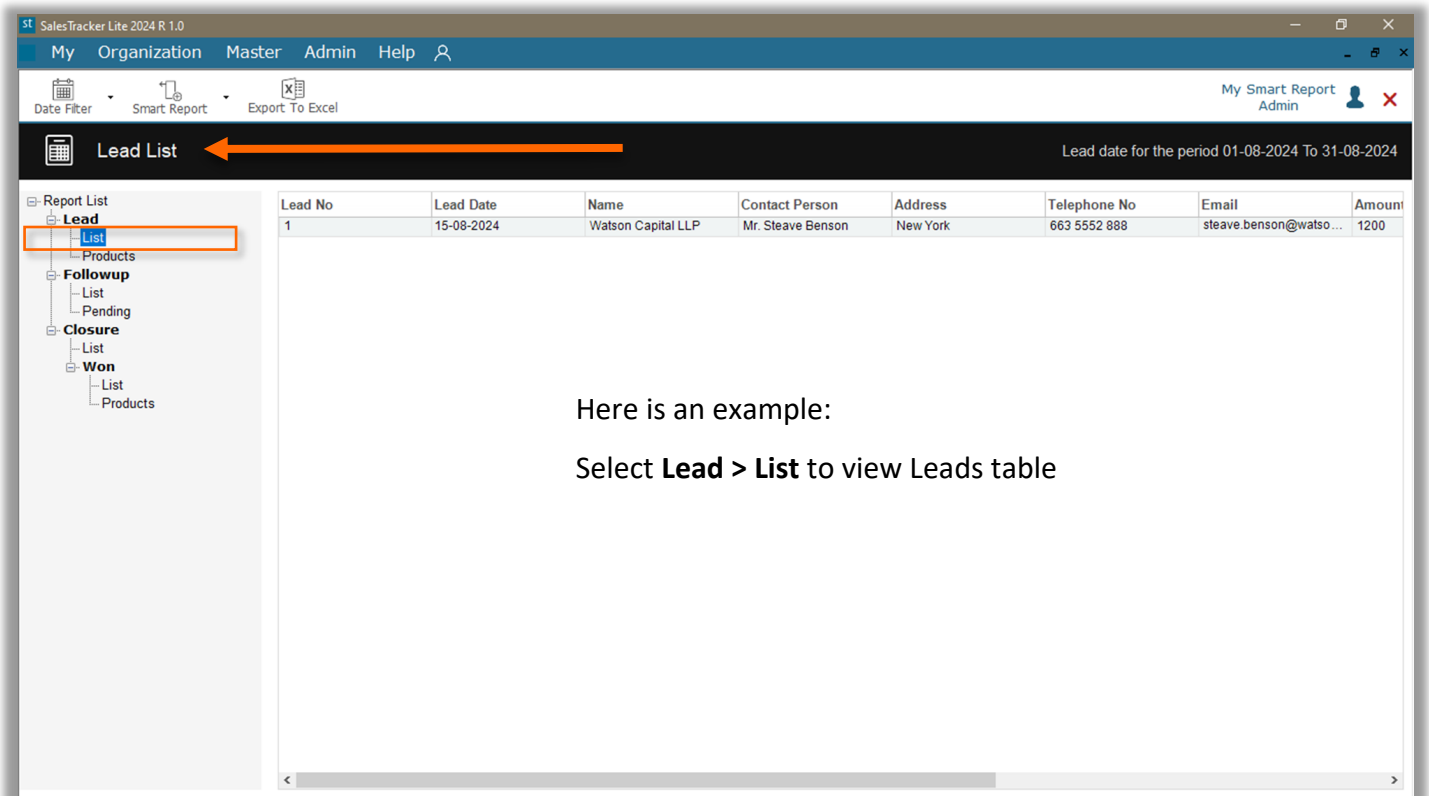
My > Reports > Smart Report

Smart Report Screen

3
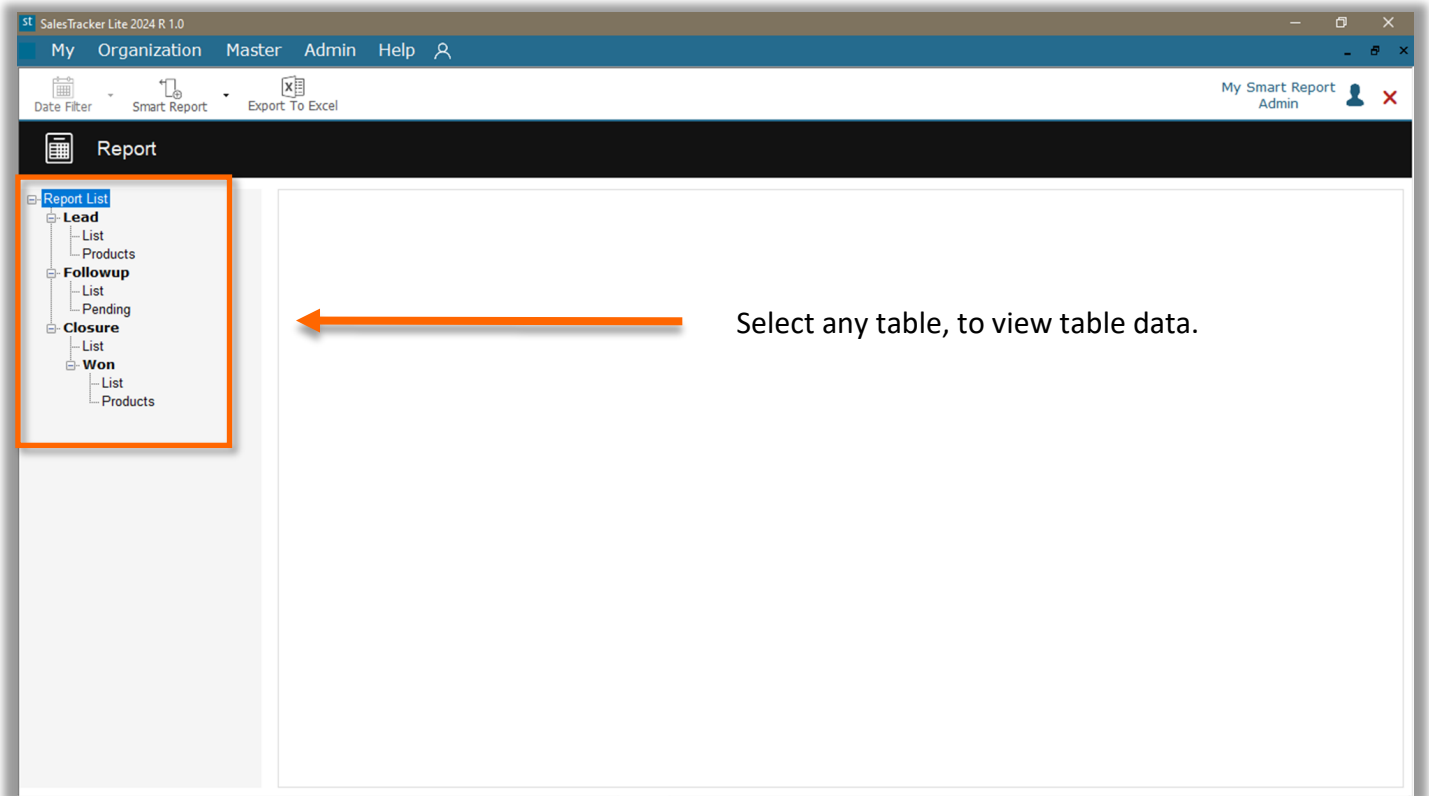
View Report

SalesTracker

SalesTracker Lite 2024 R 1.0

My   Organization   Master   Admin   Help

Date Filter   Smart Report   Export To Excel

My Smart Report
Admin

Report

- Report List
  - **Lead**
    - List
    - Products
  - **Followup**
    - List
    - Pending
  - **Closure**
    - List
    - **Won**
      - List
      - Products

Select any table, to view table data.

SalesTracker Lite 2024 R 1.0

My   Organization   Master   Admin   Help

Date Filter   Smart Report   Export To Excel

My Smart Report
Admin

Lead List

Lead date for the period 01-08-2024 To 31-08-2024

- Report List
  - **Lead**
    - List
    - Products
  - **Followup**
    - List
    - Pending
  - **Closure**
    - List
    - **Won**
      - List
      - Products

Lead No	Lead Date	Name	Contact Person	Address	Telephone No	Email	Amount
1	15-08-2024	Watson Capital LLP	Mr. Steave Benson	New York	663 5552 888	steave.benson@watso...	1200

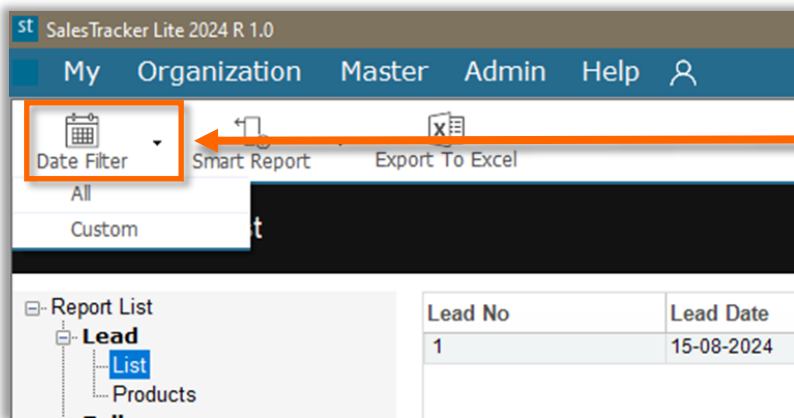Here is an example:

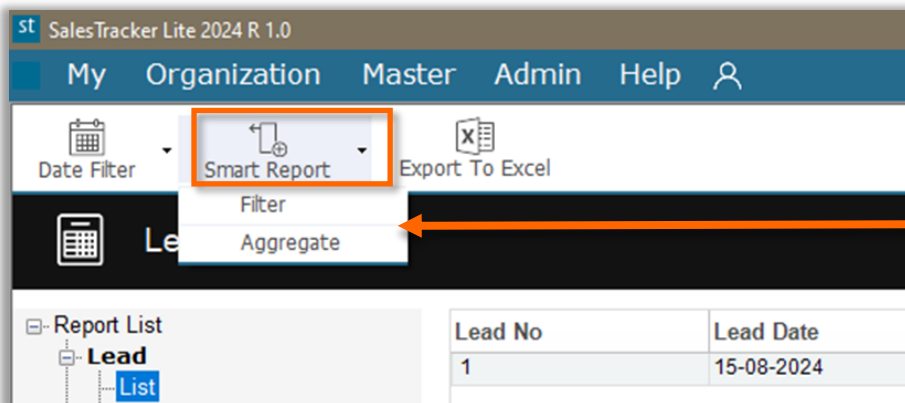Select **Lead > List** to view Leads table
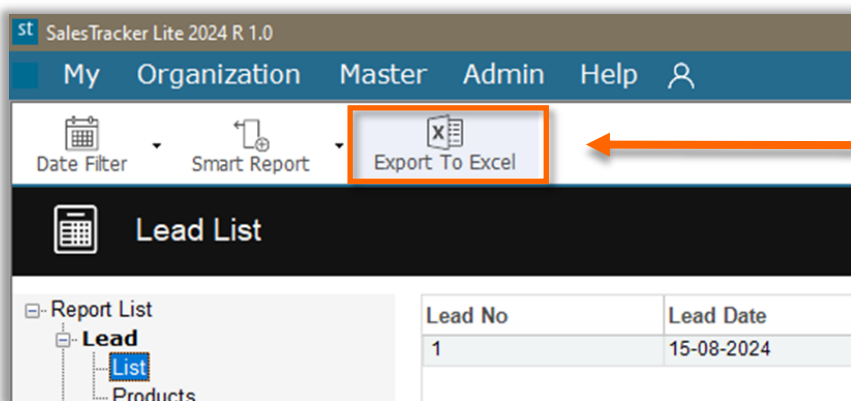
4

Additional Information

Date Filter: This button helps you to filter and show the lead records for the given date(s).

Custom date filter lets you to view leads from a particular period of time.

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

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

Not available for Lite (free) edition.
Available from Basic (paid) edition onwards

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Thank you

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

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