3 Free users for life

SPINSO

FREE

Lite edition

SalesTracker
manage leads & follow-ups

Lead Screen Interface

Step by step guide to lead screen interface in
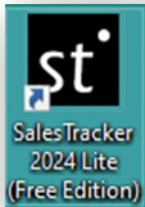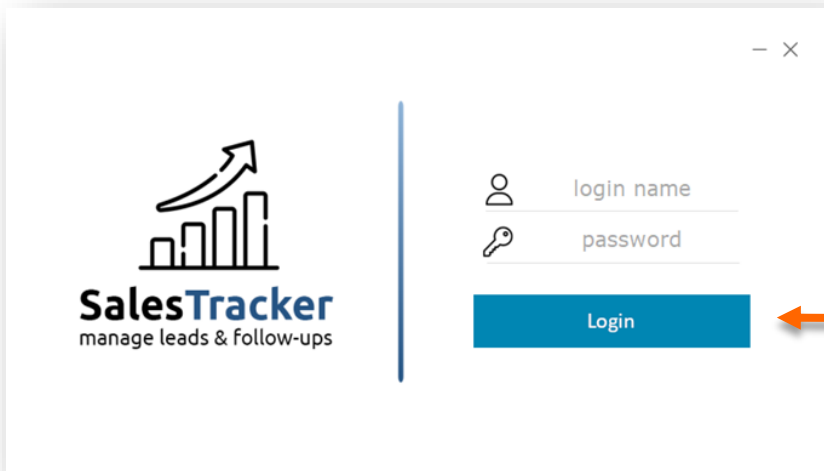
SalesTracker Lite

1 | **INDEX**

Steps
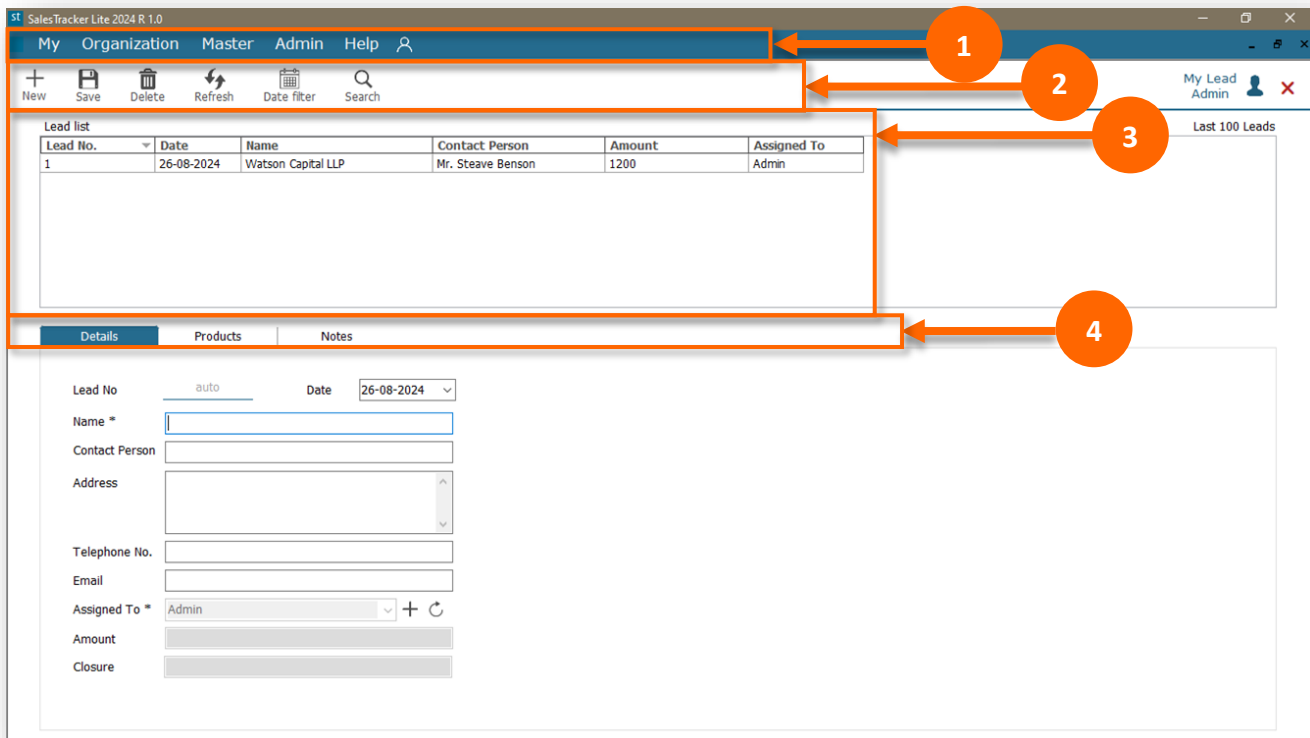
2 | Login

Start **SalesTracker.**

Enter Login name and password

Click on **Login**

3 Lead Screen Interface

SalesTracker

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.
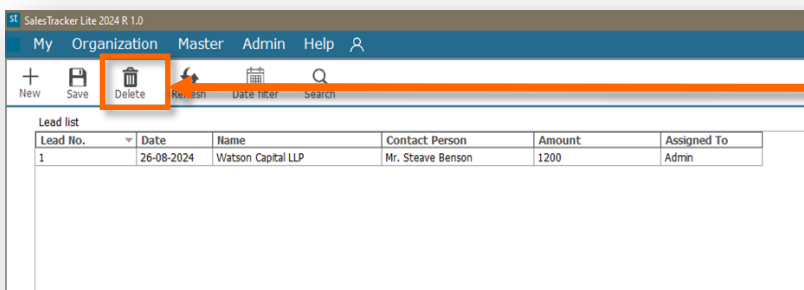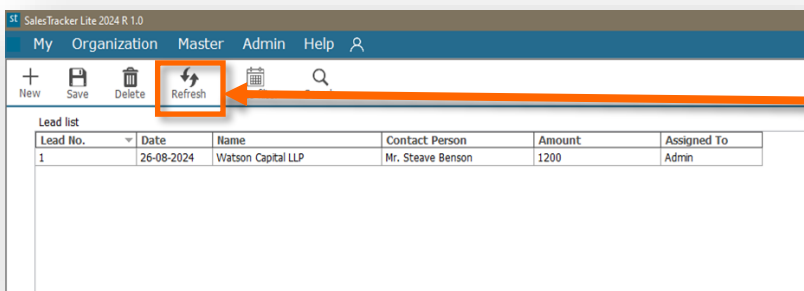
Tool Bar
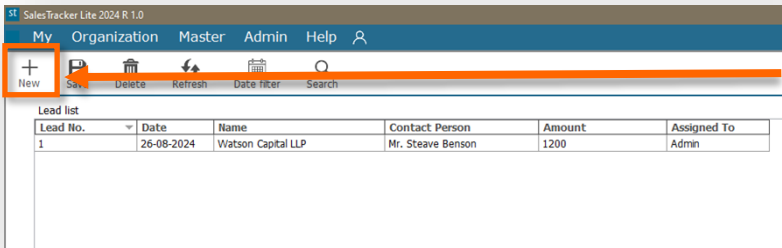
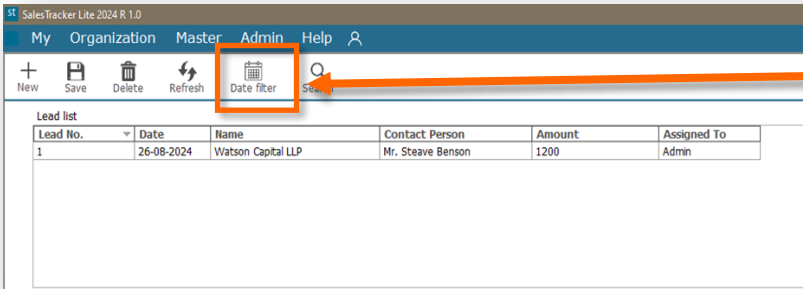**New:** Clear the fields and set them as blank. Used while entering a new lead.
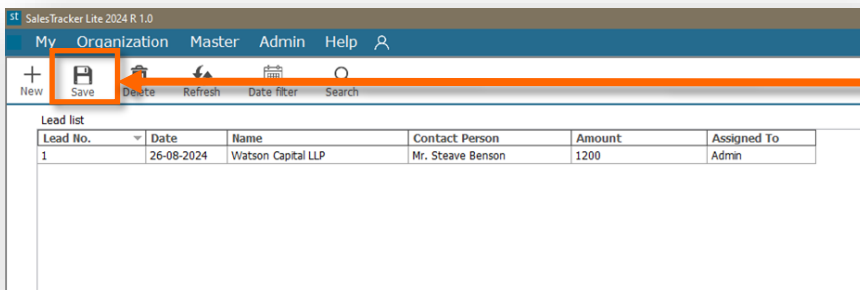
Save : Click on this button to save the lead.

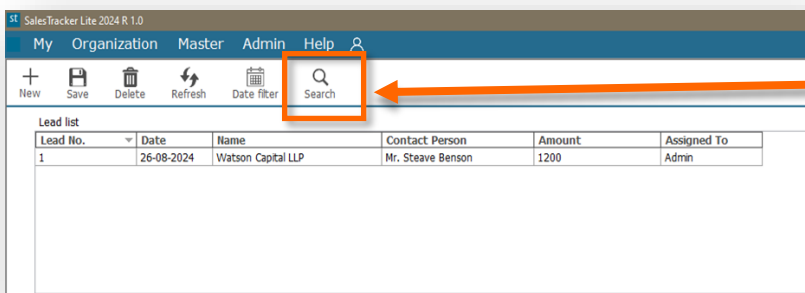**Delete :** Select a lead from the list then click on delete. This will delete the lead from the list.

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

For more information

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