



Standard edition

# SalesTracker

manage leads & follow-ups

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## Getting Started (Trial Edition)

Quick start guide for SalesTracker Standard Edition.

# 1

# INDEX

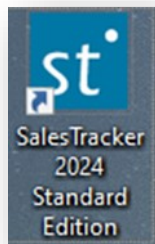
## Getting Started Guide

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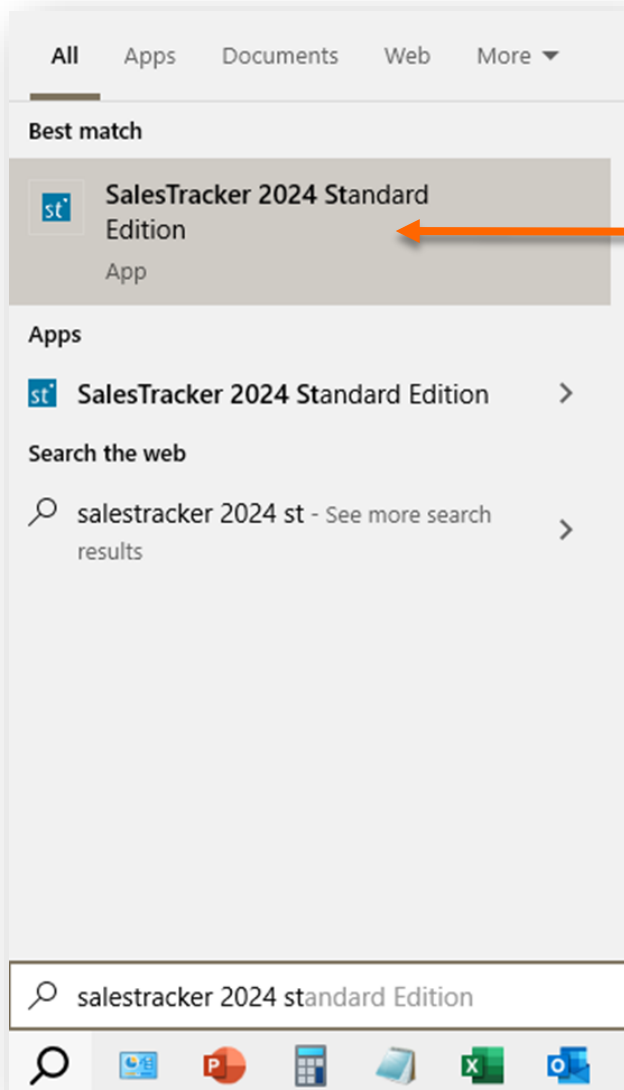
# 2

# LOGIN



Double Click on **SalesTracker** icon, on your desktop.

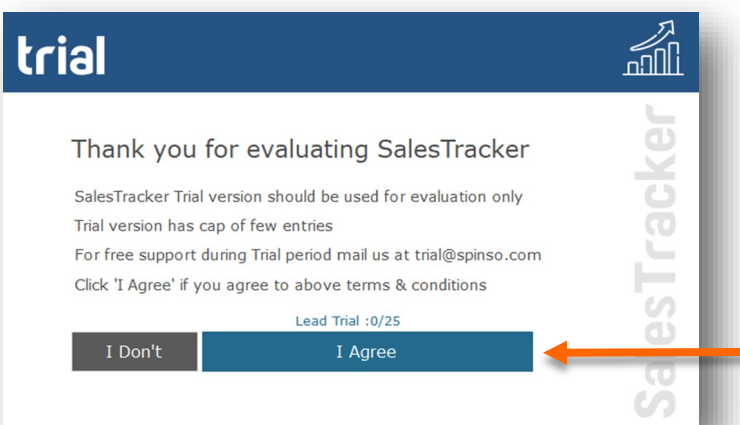
or



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

Default login details:

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

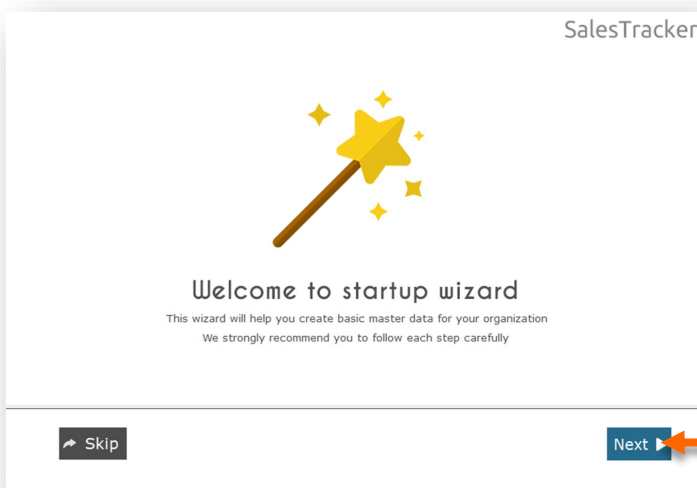


Click on I Agree

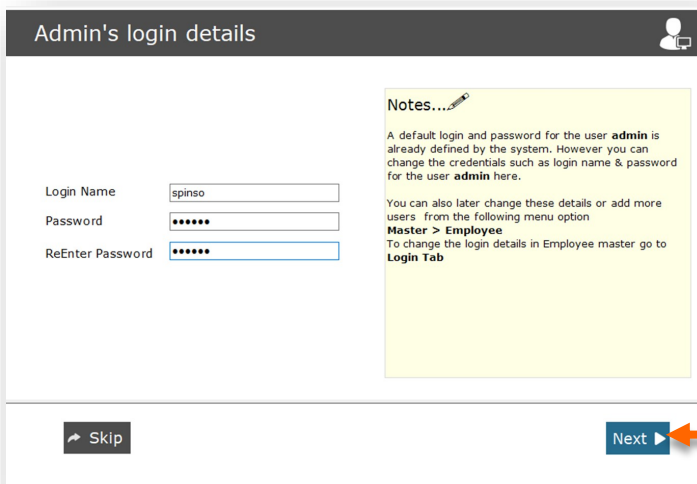
## 3

## 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.
- Here we are using IT and Networking as an example for Business type. Kindly choose a Business type that is appropriate for your business.



1

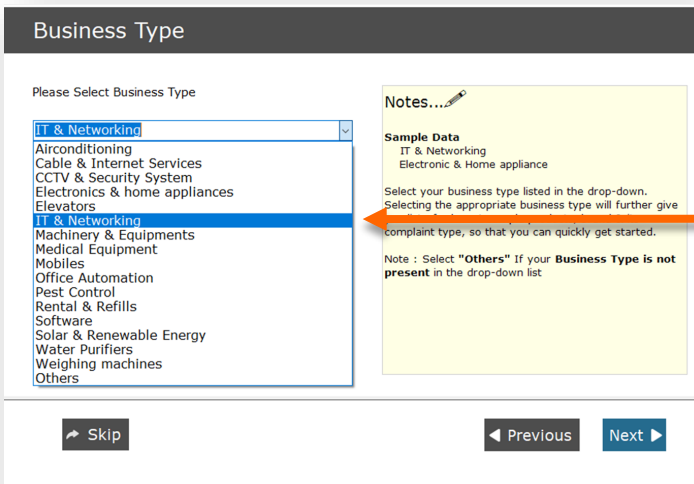
Click on **Next**.

2

Here, change Admin's Login Name &amp; Password.

The new login name &amp; Password will be used for your next login. Hence, kindly keep a note of these details.

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 complaint type, so that you can quickly get started.

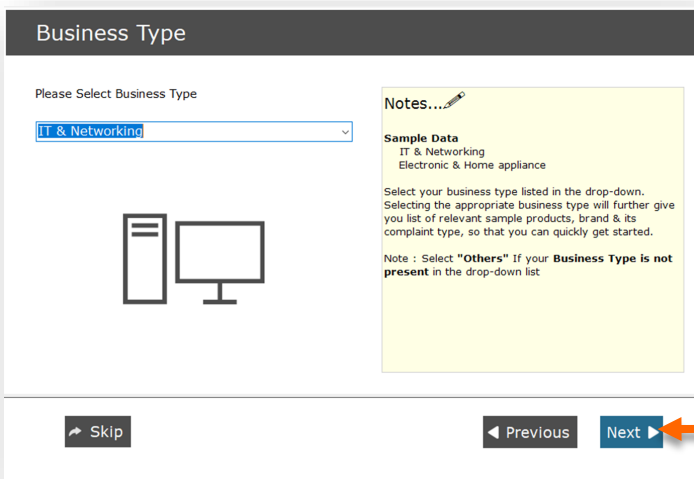
Note : Select "Others" If your **Business Type is not present** in the drop-down list

Skip Previous Next

3

Click on the list, then select your business type from the list.

Here as an example we are selecting IT and Networking. Kindly select a business type that is a best fit for your business.



**Business Type**

Please Select Business Type

IT & Networking

**Notes...**

**Sample Data**  
IT & Networking  
Electronic & Home appliance

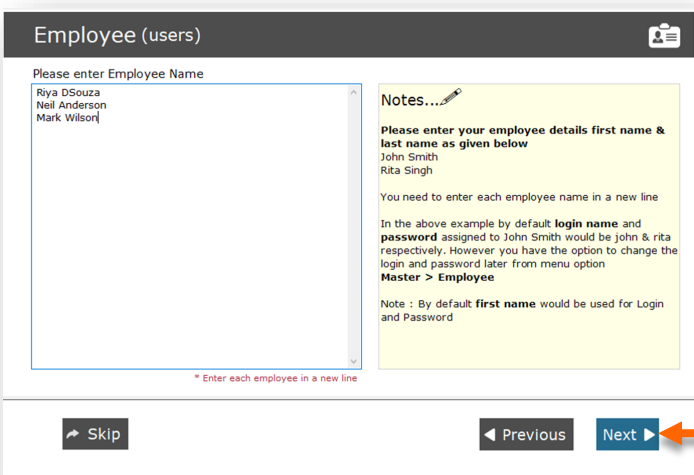
Select your business type listed in the drop-down. Selecting the appropriate business type will further give you list of relevant sample products, brand & its complaint type, so that you can quickly get started.

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

Skip Previous Next

4

Click on **Next**.



**Employee (users)**

Please enter Employee Name

Riya D'Souza  
Neil Anderson  
Mark Wilson

**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**

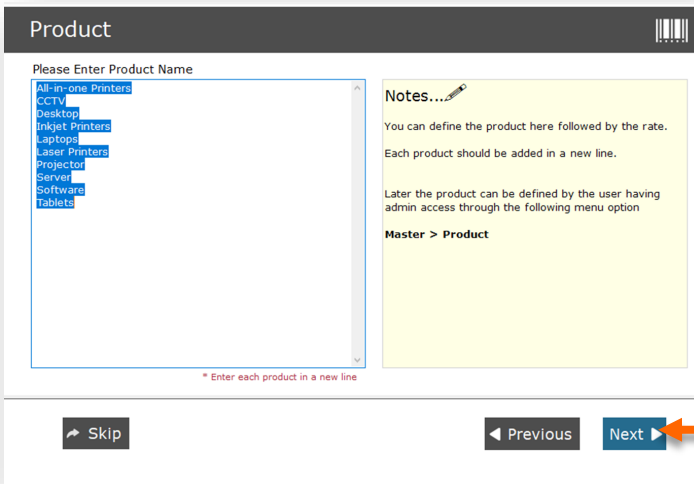
Note : By default **first name** would be used for Login and Password

\* Enter each employee in a new line

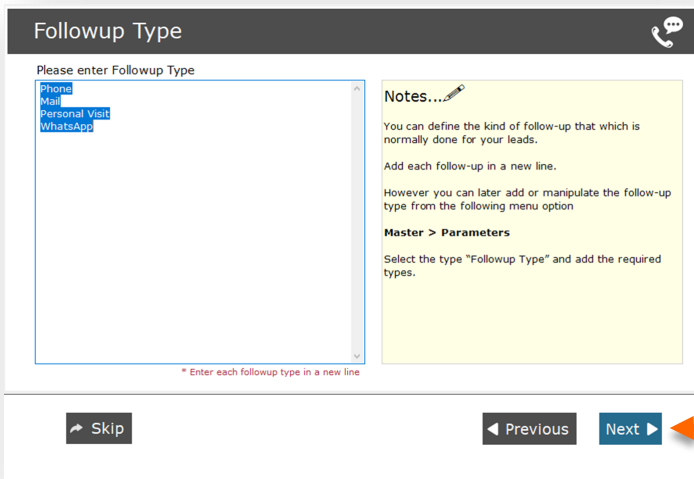
Skip Previous Next

5

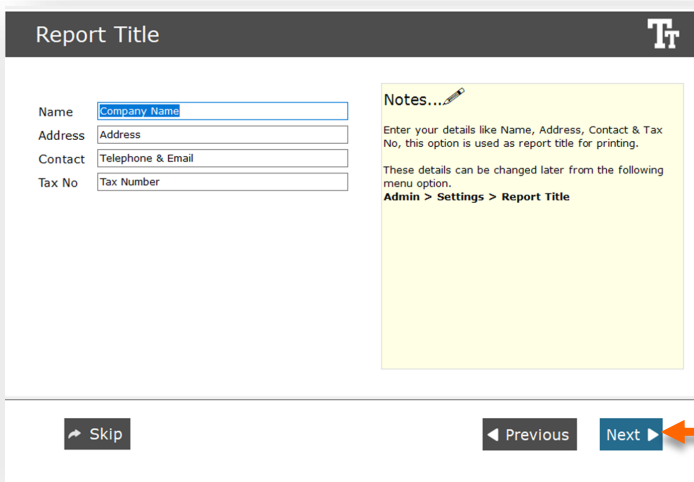
Enter employee name here, each name in a new line. Click on **Next**.



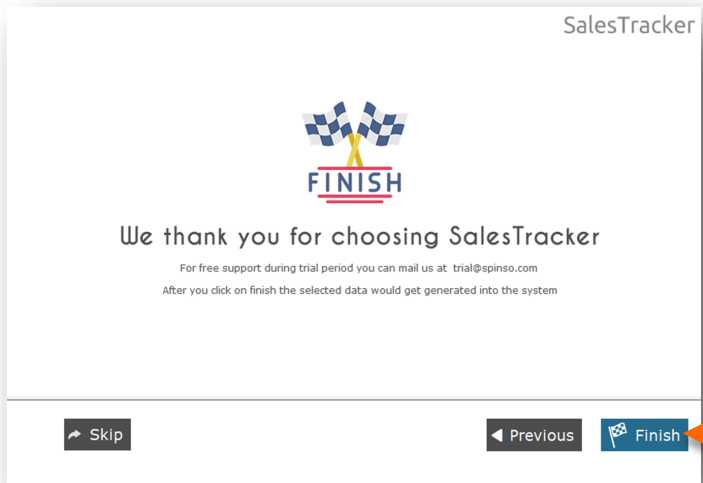
6 Enter Product here, each name in a new line. Click on **Next**.



7 Enter Follow Up type here, each Type in a new line. Click on **Next**.



8 Customize your Reports by entering Report Title here. Click on **Next**.



9

Click on **Finish**.



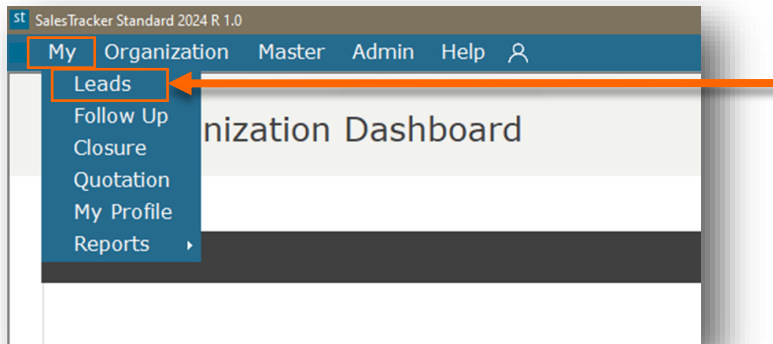
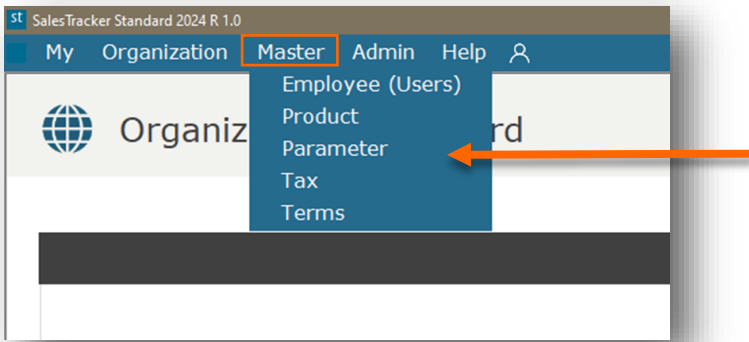
# Wizard is completed

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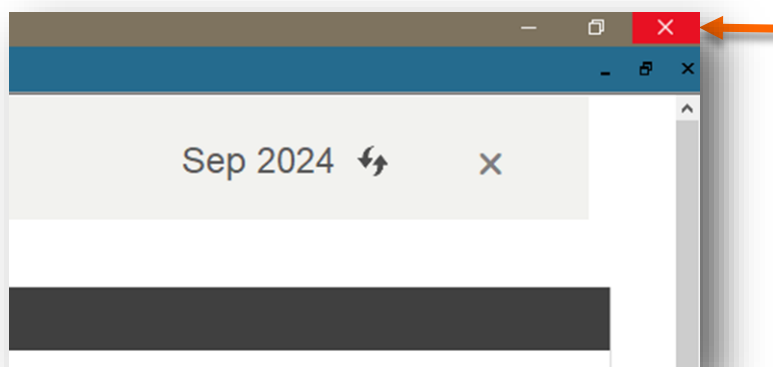
**Next Step:** To view the data entered in the wizard refer the following steps

**Note:** If you wish to change or update wizard.

- **Master** → **Employee**; here you can add/edit employee's name or password.
- **Master** → **Product**; here you can add/edit Product's name or price, etc.
- **Master** → **Parameter**; here you can add/edit Follow Up type.
- **Master** → **Tax**; to add/edit tax with amount, percentage.
- **Master** → **Terms**; to enter terms and conditions.



You can immediately start entering Leads from **My** → **Leads**

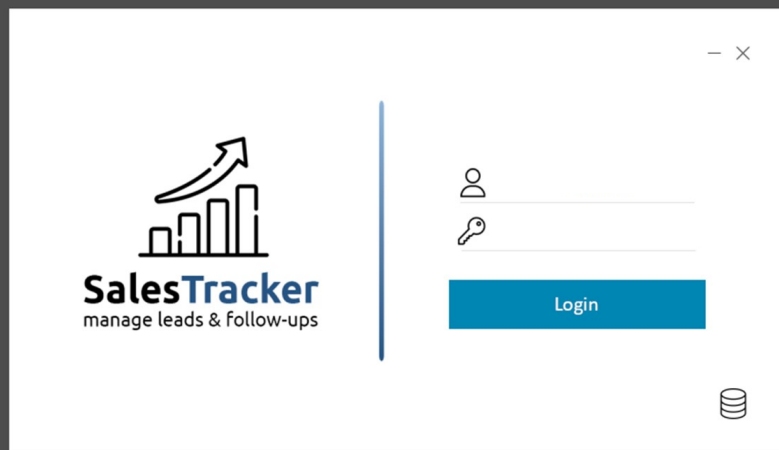


Click on this exit button to close the application.

# 4

# Re-Login

The next time, you login to our system, enter your new login credentials.



# Thank you

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## For more information

Kindly Call us or WhatsApp +91.99 201 401 00 for any queries.

For more info visit: [spinso.com](https://spinso.com)

### Next step



#### **First Lead**

how to quickly enter your first lead in SalesTracker Standard

[ST STD Entering-Your-First-Lead.pdf](#)

# SPINSO

Celebrating

# 25

years in business

## Other software products

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### ServiceDesk

manage warranties & AMC



### TimeTracker

manage timesheet & approvals



### ComplaintTracker

manage customer complaints



### QuotationTracker

create professional quotation

# SPINSO

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Road No 9, Wagle Estate,  
Near Old Passport Office,  
Thane 400 604.  
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