

SPINSO®

st



Standard edition

SalesTracker

Manage leads & follow-ups



Getting Started

Quick start guide for SalesTracker Standard Edition

1

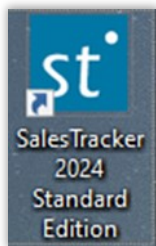
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Getting Started Guide

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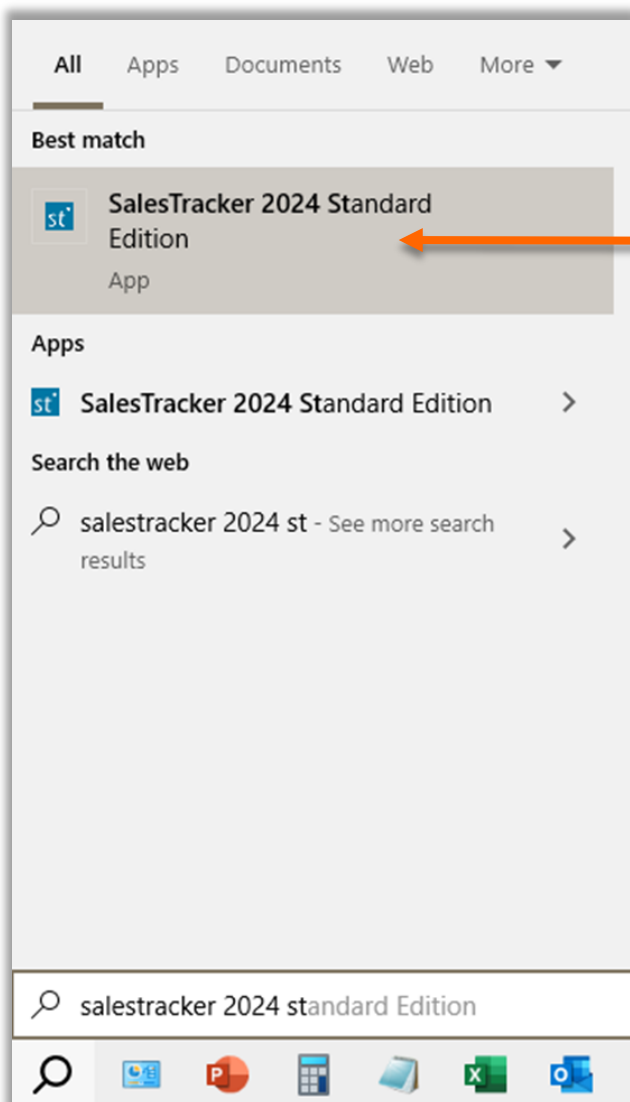
2

LOGIN



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

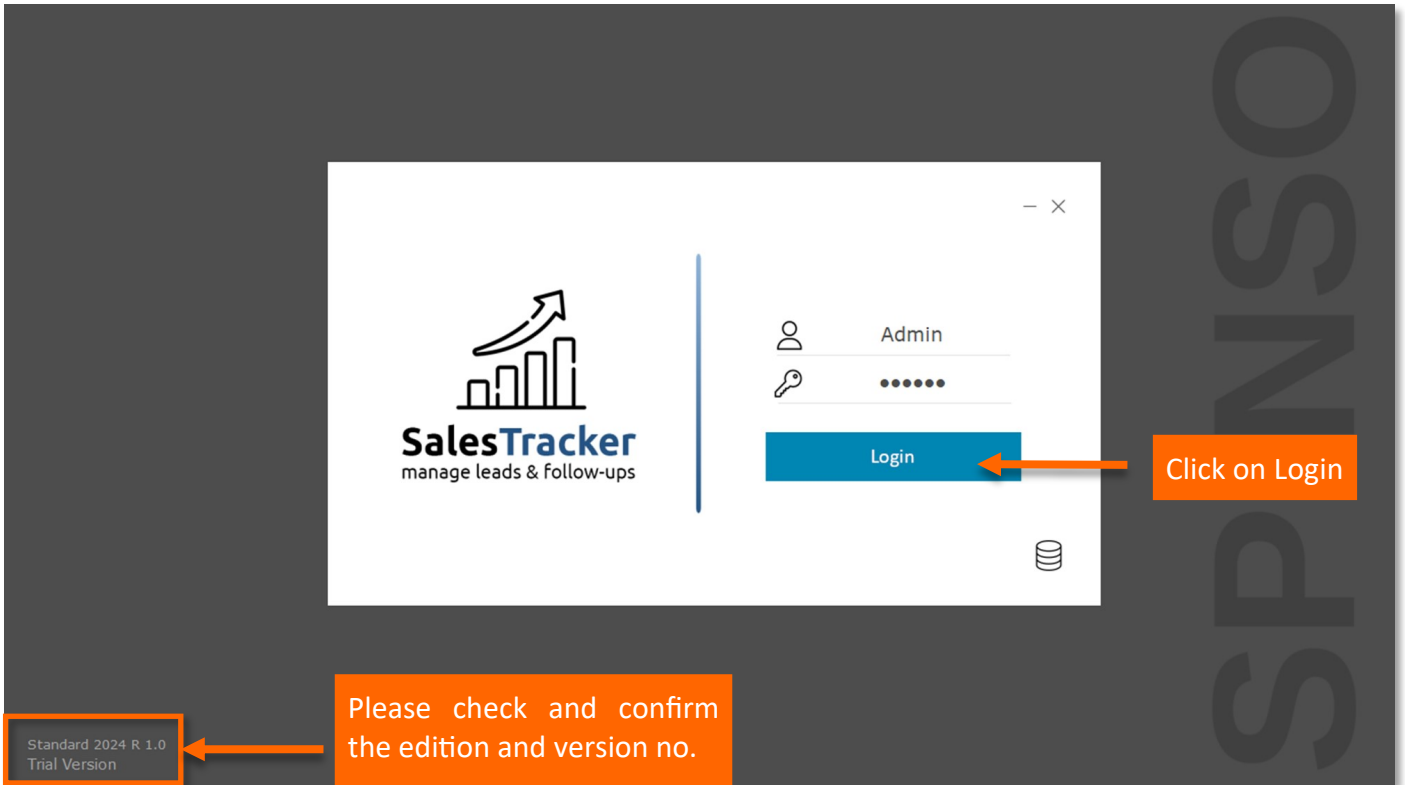
or



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

Default login details:

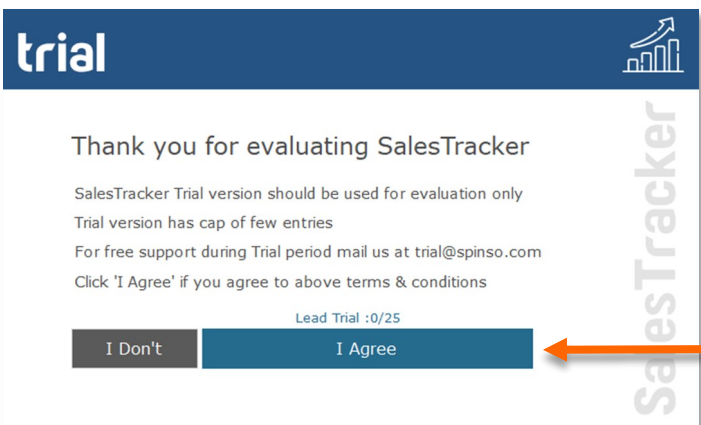
- User Name : **admin**
- Password : **spinso**



Standard 2024 R 1.0
Trial Version

Please check and confirm the edition and version no.

Click on Login



trial

Thank you for evaluating SalesTracker

SalesTracker Trial version should be used for evaluation only
Trial version has cap of few entries
For free support during Trial period mail us at trial@spinso.com
Click 'I Agree' if you agree to above terms & conditions

Lead Trial :0/25

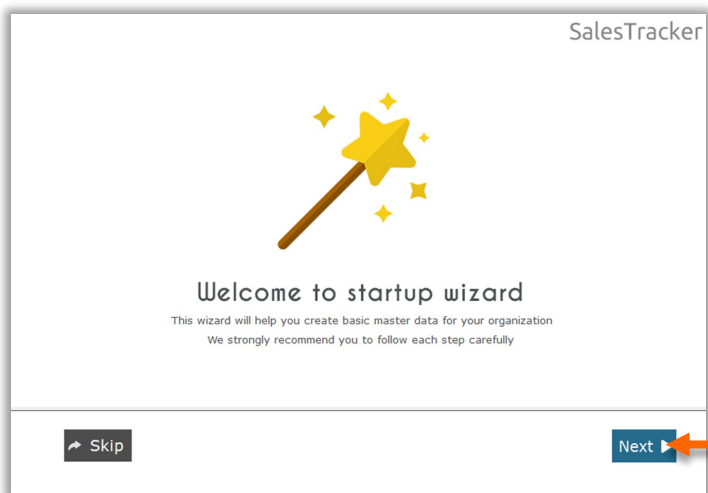
I Don't I Agree

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.



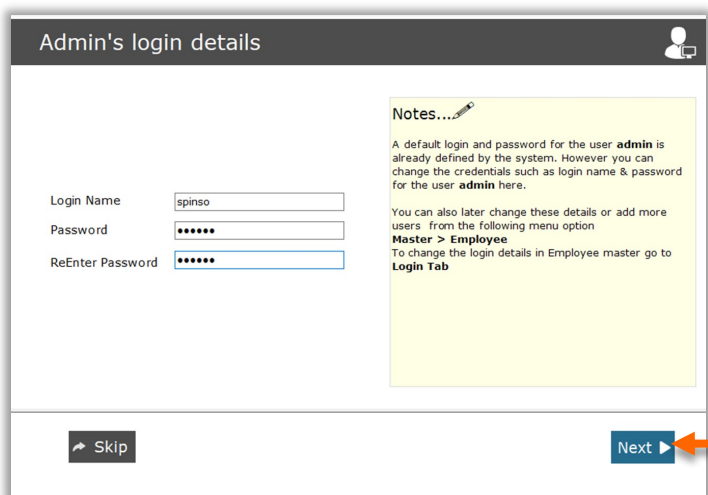
SalesTracker

Welcome to startup wizard

This wizard will help you create basic master data for your organization
We strongly recommend you to follow each step carefully

Skip Next

1

Click on **Next**.

Admin's login details

Login Name: spinso

Password:

ReEnter Password:

Notes...

A default login and password for the user **admin** is already defined by the system. However you can change the credentials such as login name & password for the user **admin** here.

You can also later change these details or add more users from the following menu option
Master > Employee
To change the login details in Employee master go to **Login Tab**

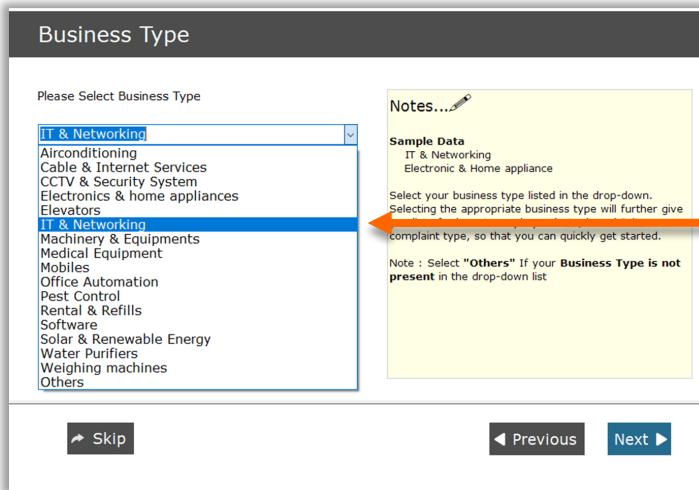
Skip Next

2

Here, change Admin's Login Name & Password.

The new login name & 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

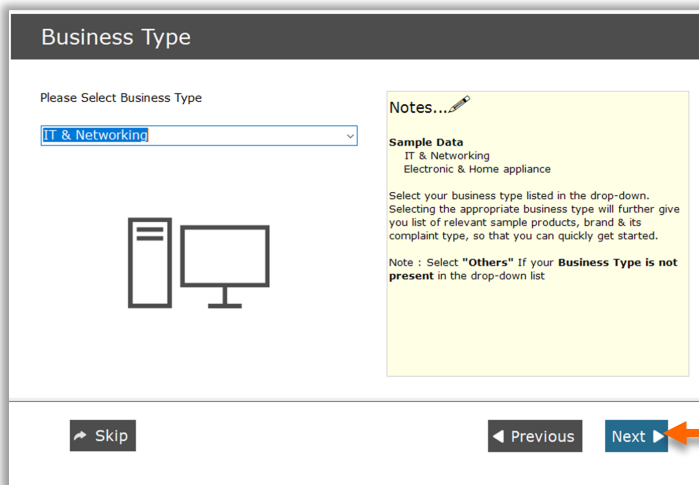
Select your business type listed in the drop-down. Selecting the appropriate business type will further give complaint type, so that you can quickly get started.

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.



Business Type

Please Select Business Type

IT & Networking

Notes...

Sample Data
IT & Networking
Electronic & Home appliance

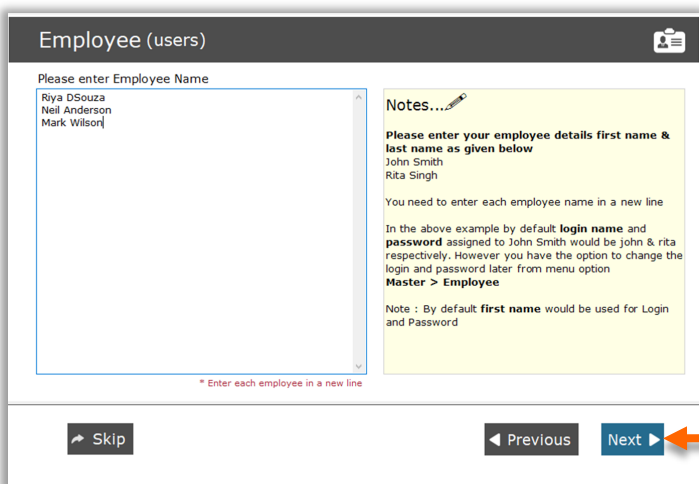
Select your business type listed in the drop-down. Selecting the appropriate business type will further give you list of relevant sample products, brand & its complaint type, so that you can quickly get started.

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 DSouza
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

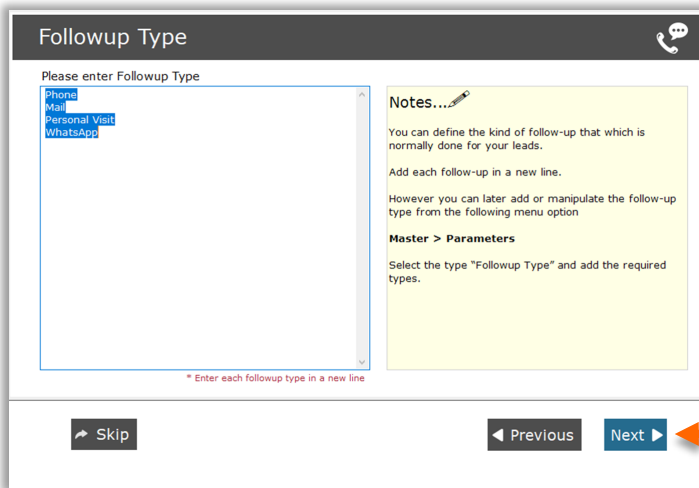
Skip Previous Next

5

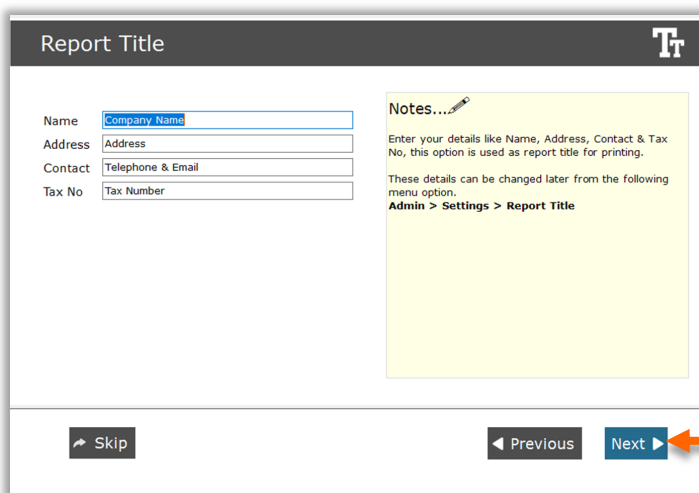
Enter employee name here, each name in a new line. Click on **Next**.



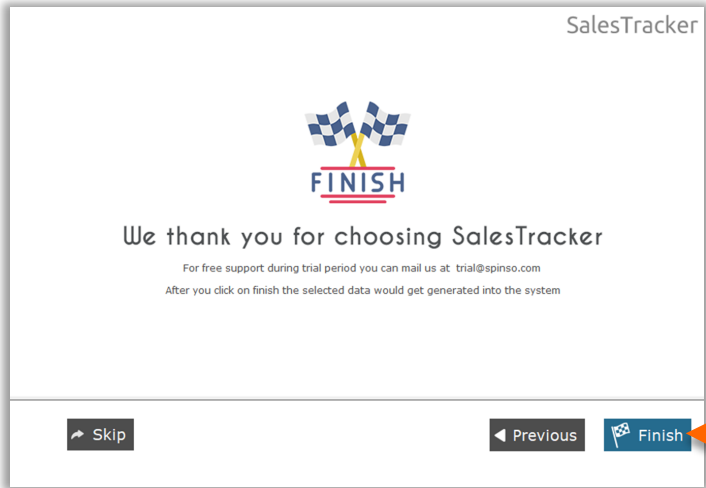
6 Enter Product here, each name in a new line. Click on **Next**.



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**.



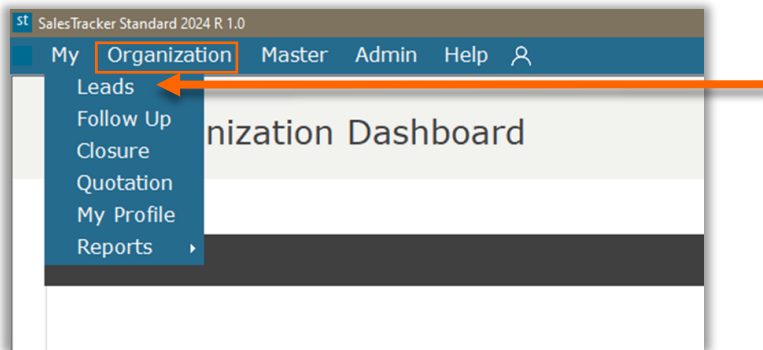
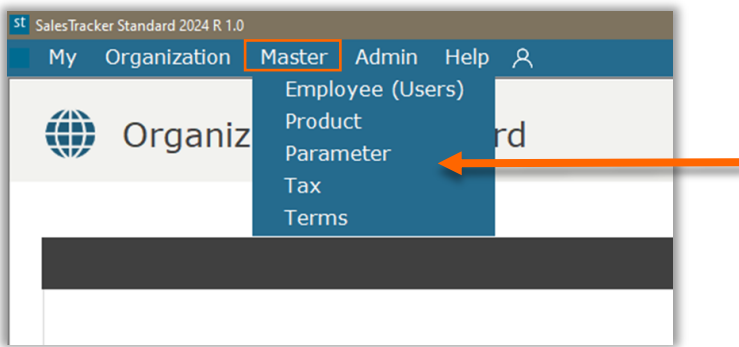
9

Click on **Finish**.

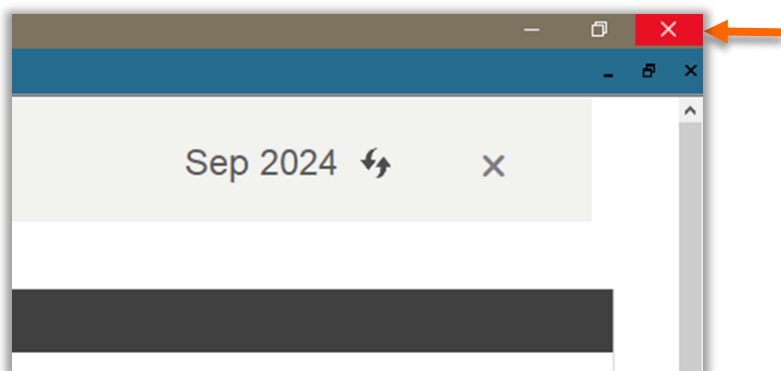
Wizard is completed

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 **Organization** → **Leads**

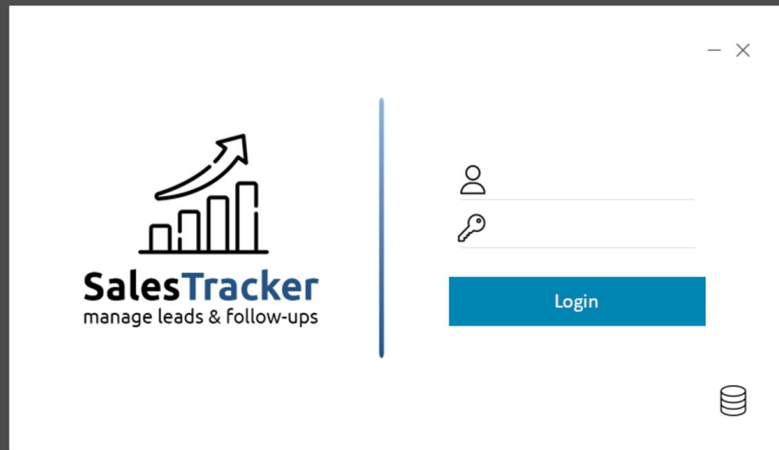


Click on this exit button to close the application.

4

Re-Login

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



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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 **Entering Your first Lead** Help file Next.

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