

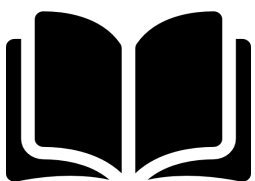
SPINSO[®]



Standard edition

SalesTracker

manage leads & follow-ups



Entering a Lead (Trial Edition)

Step by step guide on how to enter a Lead in SalesTracker Standard.

1

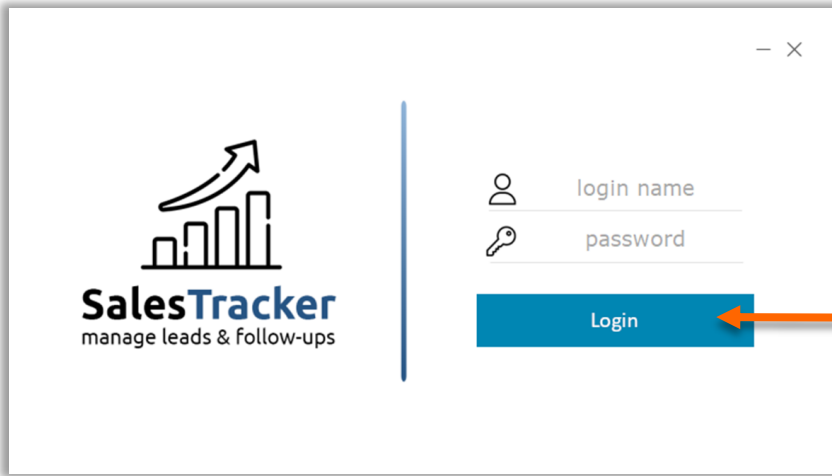
INDEX

Steps

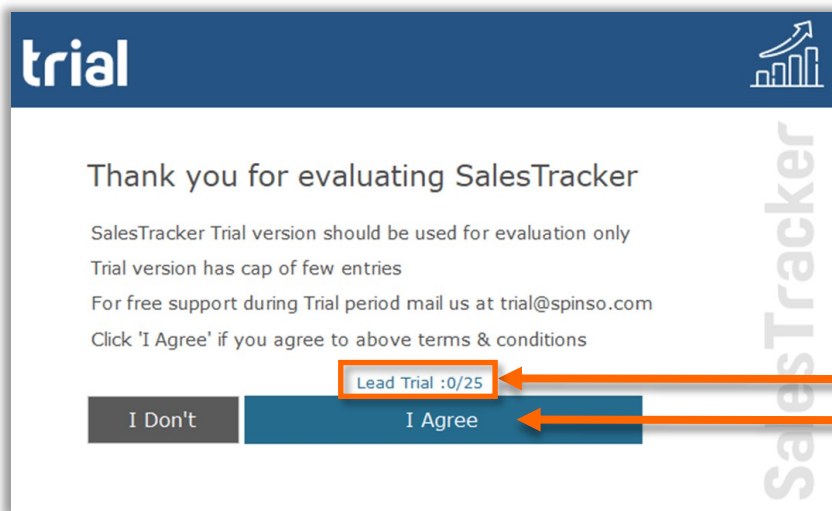
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Go To Lead Screen

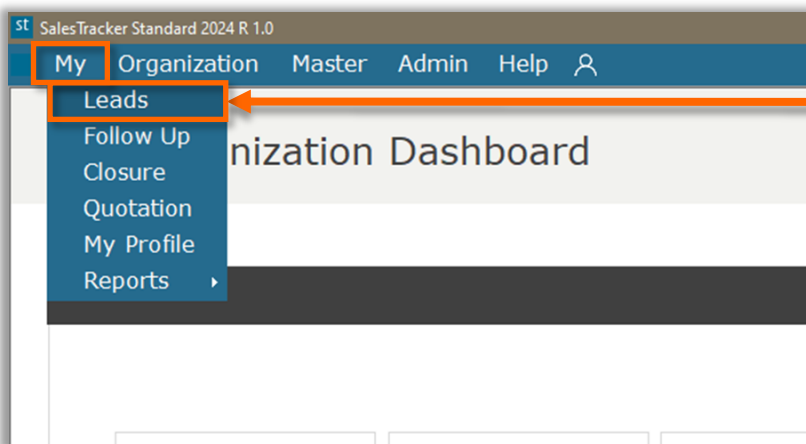


Enter Login name and password
Click on **Login**



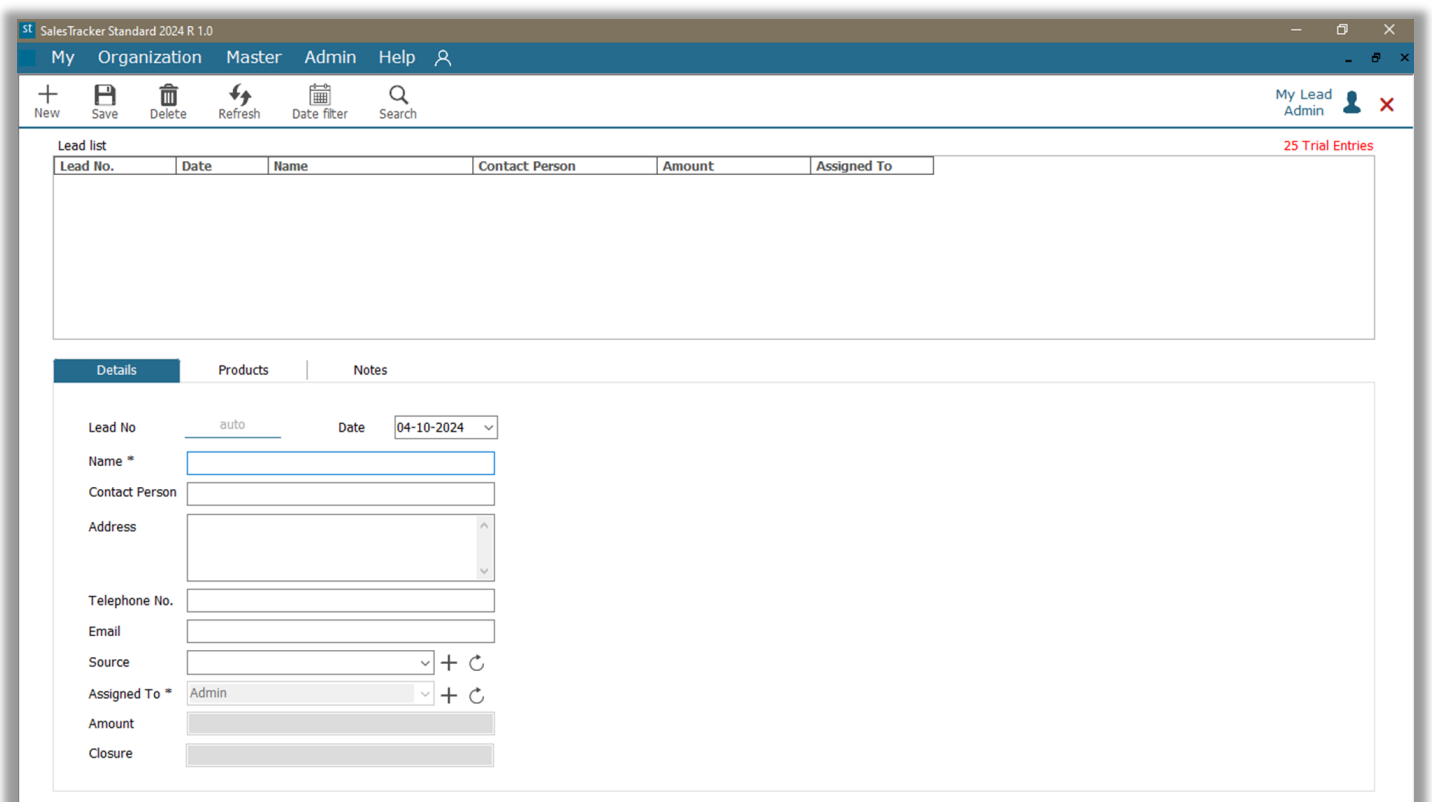
Please note: this is a trial edition, has a cap of 25 trial entries.

No. of trial entries used.
Click on **I Agree**



Go to
My > Leads

Lead Screen



The screenshot shows the SalesTracker Standard 2024 R 1.0 interface. The top navigation bar includes 'My', 'Organization', 'Master', 'Admin', and 'Help'. Below this is a toolbar with icons for 'New', 'Save', 'Delete', 'Refresh', 'Date filter', and 'Search'. The user profile 'My Lead Admin' is visible in the top right corner.

The main area is titled 'Lead list' and contains a table with the following columns: 'Lead No.', 'Date', 'Name', 'Contact Person', 'Amount', and 'Assigned To'. The table is currently empty. A red text label '25 Trial Entries' is located in the top right corner of the table area.

Below the table is a 'Details' section with three tabs: 'Details', 'Products', and 'Notes'. The 'Details' tab is active and shows the following fields:

- Lead No: auto
- Date: 04-10-2024
- Name *
- Contact Person
- Address
- Telephone No.
- Email
- Source
- Assigned To * Admin
- Amount
- Closure

Please note: this is a trial edition, has a cap of 25 trial entries.

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Entering a Lead

SalesTracker Standard 2024 R 1.0

My Organization Master Admin Help

New Save Delete Refresh Date filter Search

Lead list

Lead No.	Date	Name	Contact Person	Amount	Assigned To

Details Products Notes

Lead No auto Date 04-10-2024

Name *

Contact Person

Address

Telephone No.

Email

Source +

Assigned To * Admin +

Amount

Closure

There are three tabs:

- **Details** : Lead details are filled here.
- **Products** : Product details are filled here.
- **Notes** : any notes or remarks are filled here.

Lets fill them one by one.

SalesTracker Standard 2024 R 1.0

My Organization Master Admin Help

New Save Delete Refresh Date filter Search

Lead list

Lead No.	Date	Name	Contact Person

Details Products Notes

Lead No auto Date 04-10-2024

Name * Nexus Group

Contact Person Mr. Michal

Address Texas

Telephone No. 052 66554 523

Email michal.jose@nexus.com

Source Website +

Assigned To * Admin +

Amount

Closure

Fill in the Details:

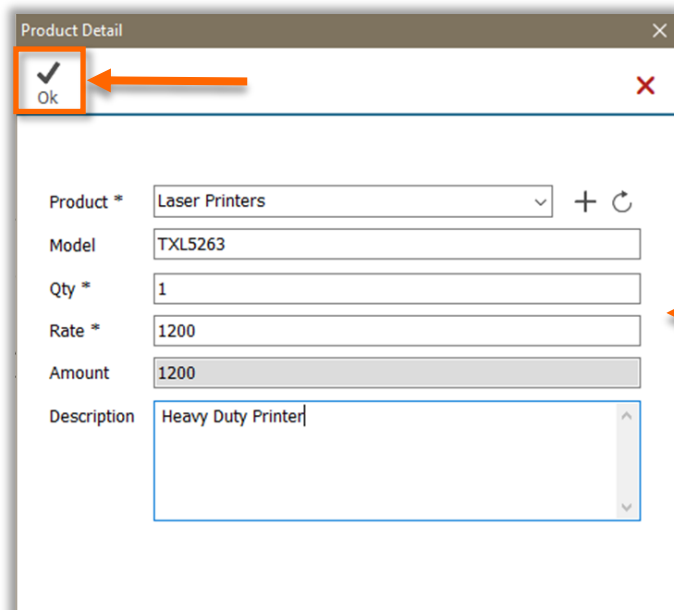
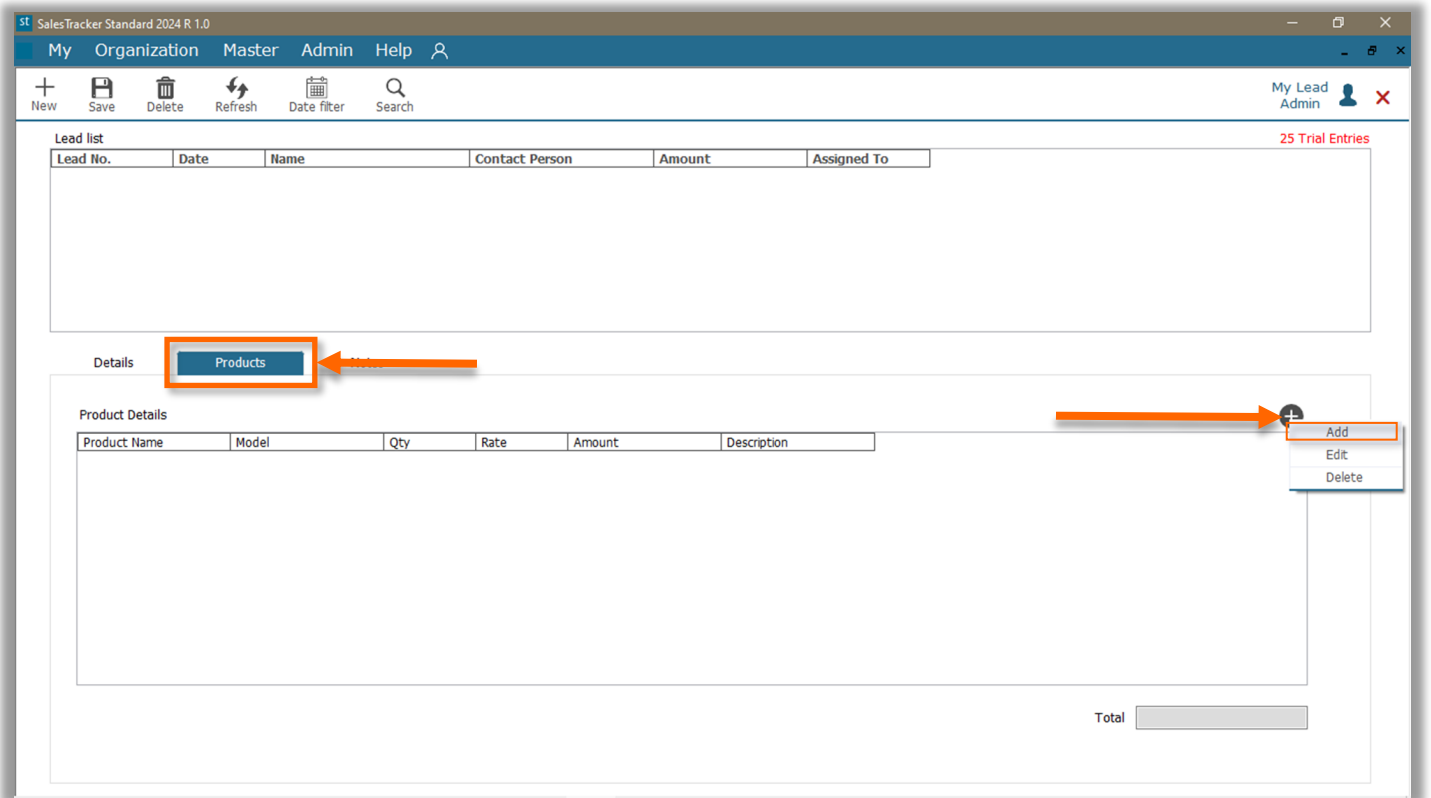
- Enter name
- Contact Person
- Address
- Telephone No.
- Email
- Select Source

Note:

- For Assigned To, data will be auto selected by the login user name.
- Amount and Closure details will be filled once the lead is closed.
- Lead No. will be auto generated by the system.

Products Tab:

- Click on the Plus Icon on the right.
 - Select **Add**
- Product Details** window will open.



Product Details:

- Select Product
 - Enter model
 - Quantity
 - Rate
 - Amount will be auto calculated.
 - Enter any notes or description for the product
- Click on **Ok** to save.

SalesTracker Standard 2024 R 1.0

My Organization Master Admin Help

New Save Delete Refresh Date filter Search

My Lead Admin

Lead list 25 Trial Entries

Lead No.	Date	Name	Contact Person	Amount	Assigned To
<p>To add multiple Products click on the plus icon > Select Add.</p> <p>Repeat the same process.</p>					

Details **Products** Notes

Product Details

Product Name	Model	Qty	Rate	Amount	Description
Laser Printers	TXL5263	1	1200	1200	Heavy Duty Printer

Product is added to the list.

Total 1200

Notes Tab:

Enter any notes or Remarks here.

SalesTracker Standard 2024 R 1.0

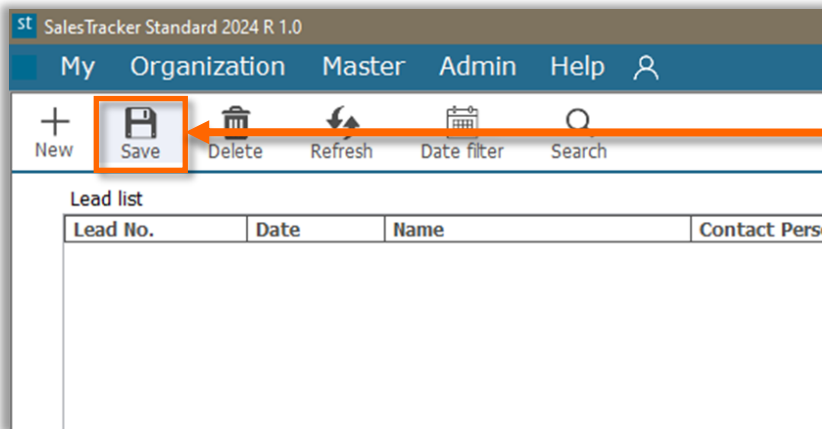
My Organization Master Admin Help

New Save Delete Refresh Date filter Search

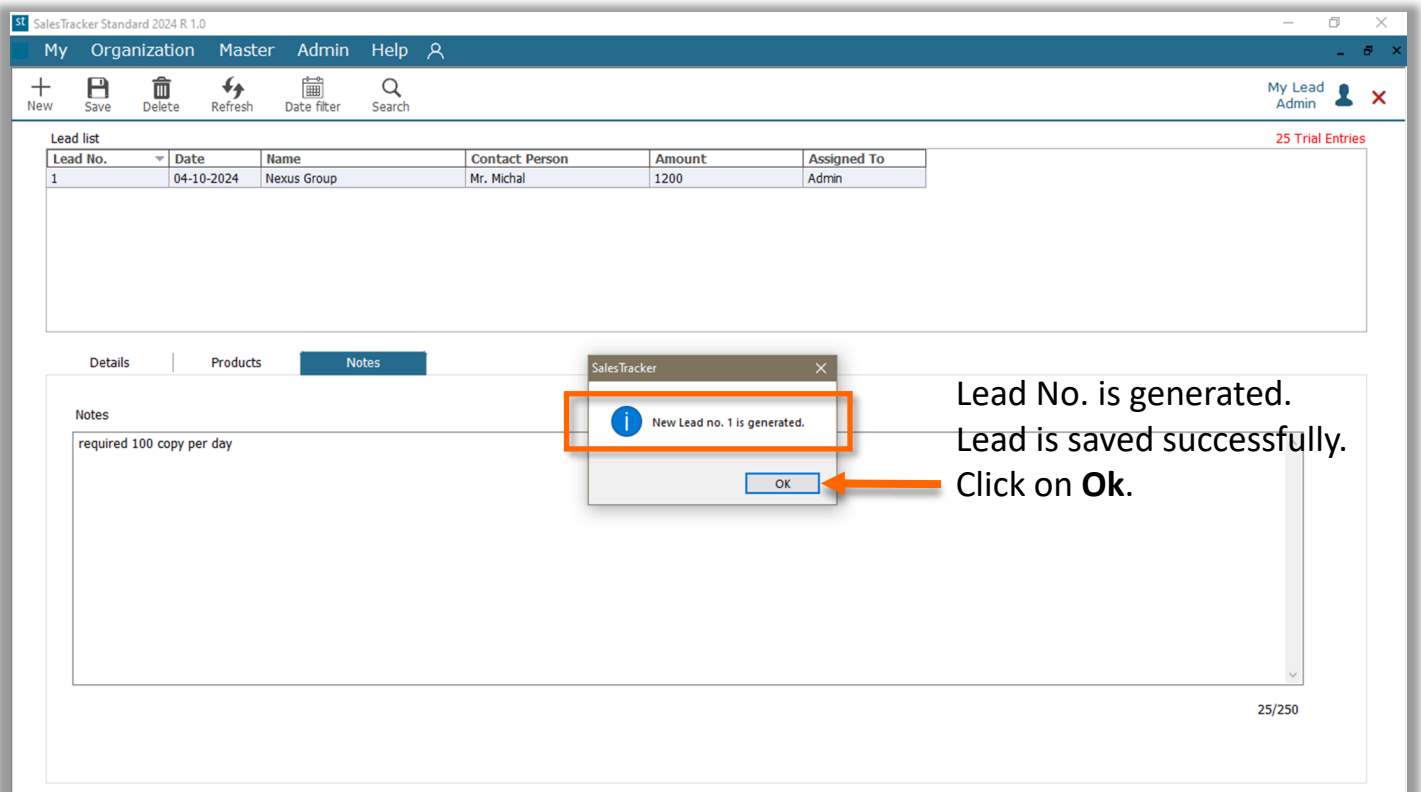
My Lead Admin

Lead list 25 Trial Entries

Lead No.	Date	Name	Contact Person	Amount	Assigned To
<p>Details Products Notes</p> <p>Notes</p> <p>required 100 copy per day</p> <p style="text-align: right;">25/250</p>					

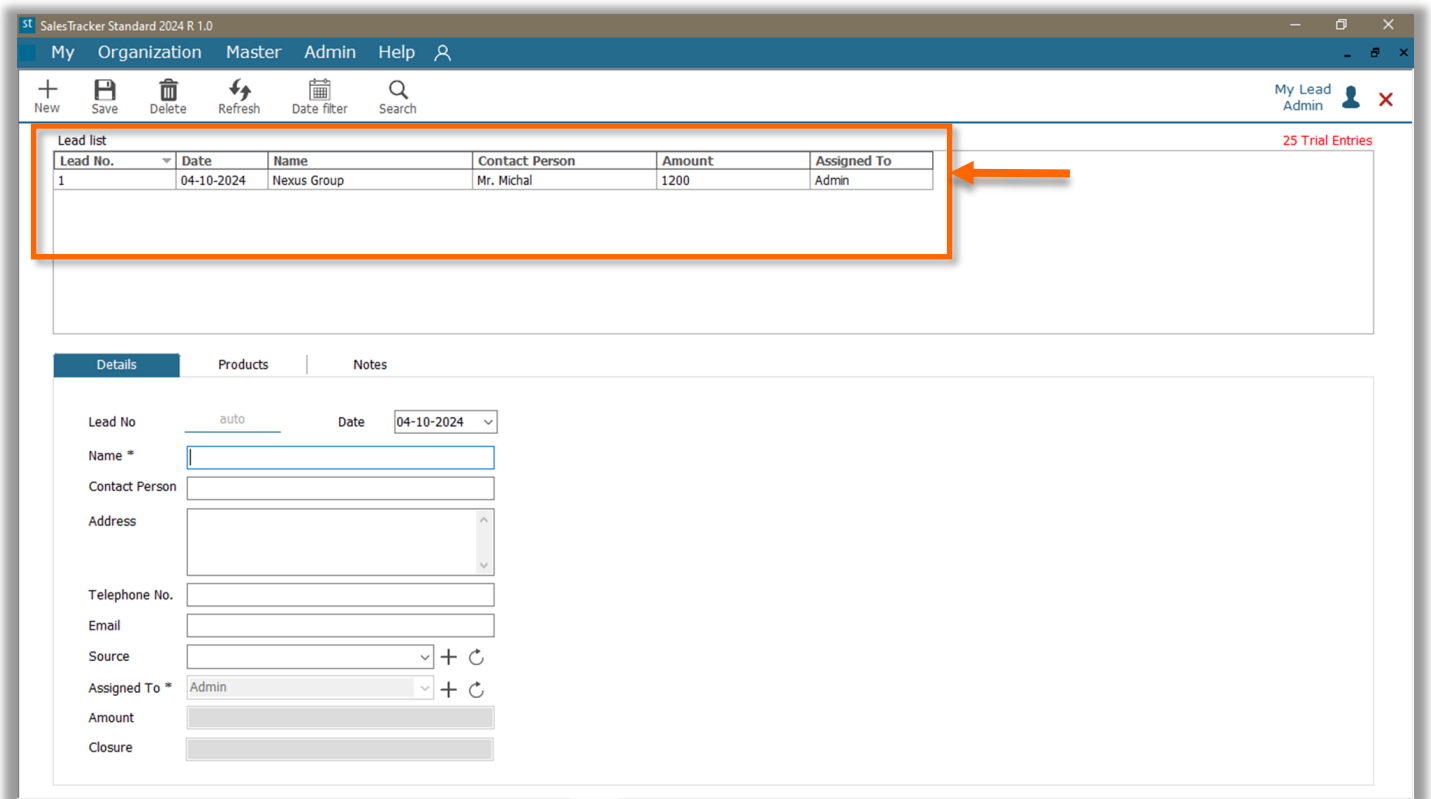


Click on **Save**.



Lead No. is generated.
Lead is saved successfully.
Click on **Ok**.

The lead can be seen in the Lead list.



The screenshot shows the SalesTracker Standard 2024 R 1.0 application window. The top navigation bar includes 'My', 'Organization', 'Master', 'Admin', and 'Help'. Below this is a toolbar with icons for 'New', 'Save', 'Delete', 'Refresh', 'Date filter', and 'Search'. The user is logged in as 'My Lead Admin'.

The main area displays a 'Lead list' table with the following data:

Lead No.	Date	Name	Contact Person	Amount	Assigned To
1	04-10-2024	Nexus Group	Mr. Michal	1200	Admin

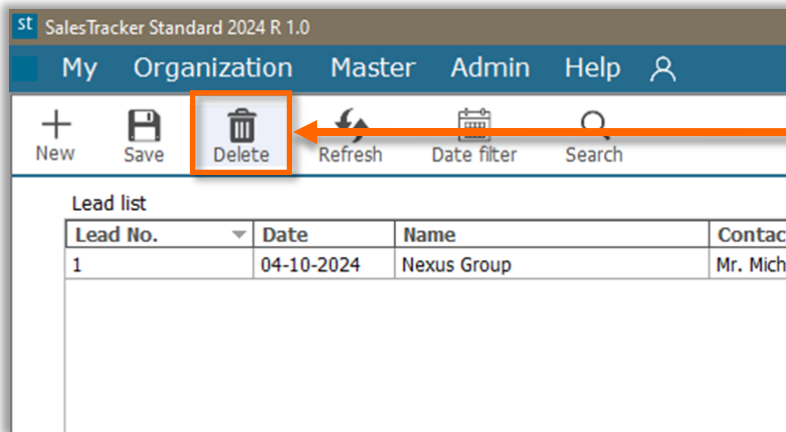
An orange box highlights the table, and an orange arrow points to the 'Assigned To' column. The text '25 Trial Entries' is visible in the top right corner of the table area.

Below the table is a 'Details' form with the following fields:

- Lead No: auto
- Date: 04-10-2024
- Name *
- Contact Person
- Address
- Telephone No.
- Email
- Source
- Assigned To * Admin
- Amount
- Closure

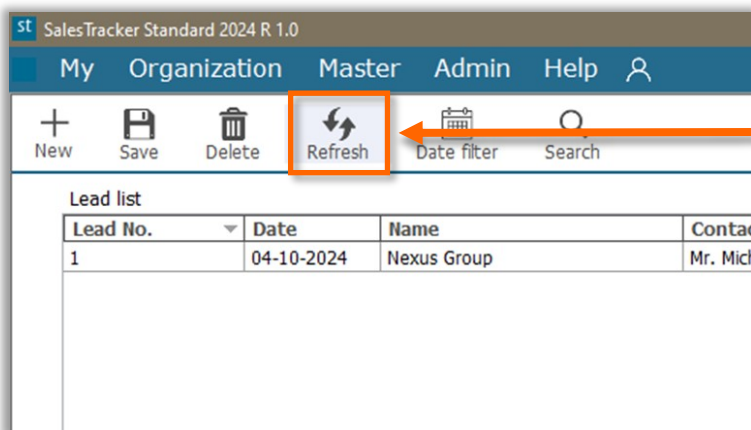
4

Additional Information

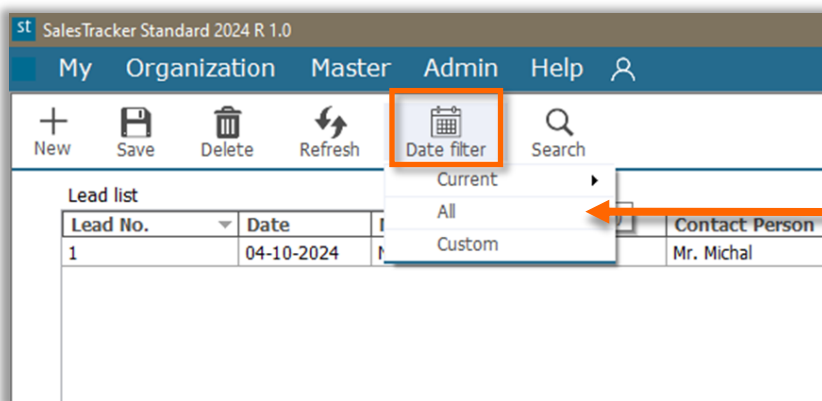


Delete :

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



Refresh : to refresh the screen

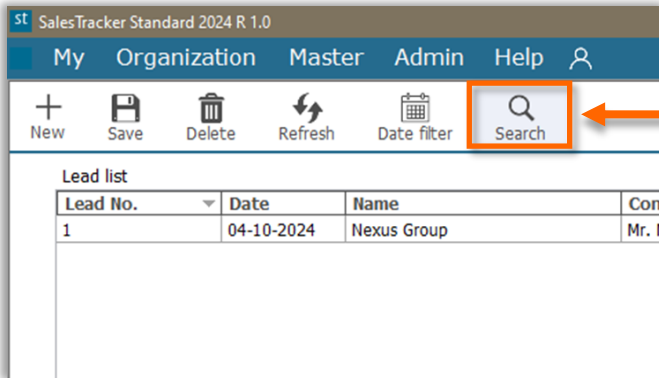


Date Filter:

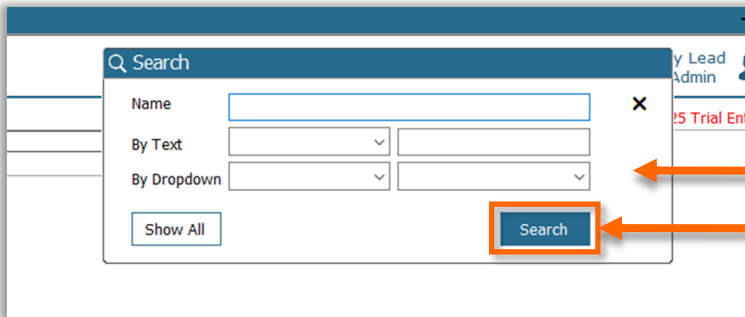
Filter the Lead records by date

Custom Date Filter:

Find records from a particular period of time.



Search:
Search/find records by Name, product etc. from the Lead list.



Enter name or select product, etc.
click on **Search**

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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 Follow Up** Help file Next.

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