

SPINSO[®]



Standard edition

SalesTracker

manage leads & follow-ups



Entering a Follow UP (Trial Edition)

Step by step guide to enter a Follow Up in SalesTracker Standard.

1

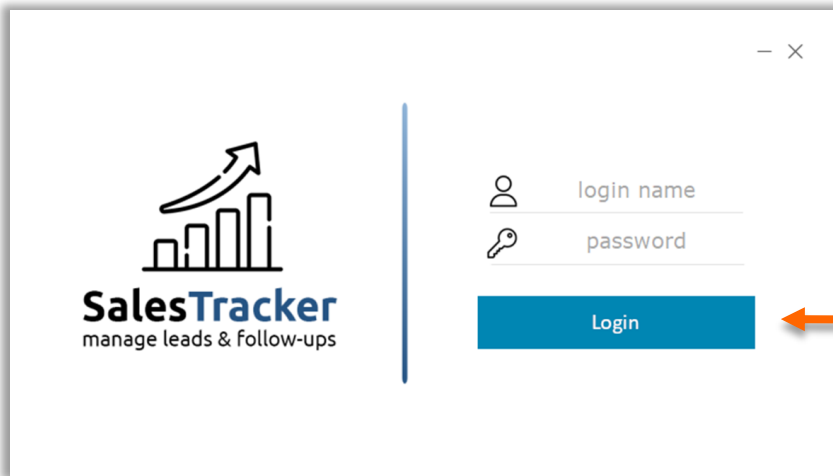
INDEX

Steps

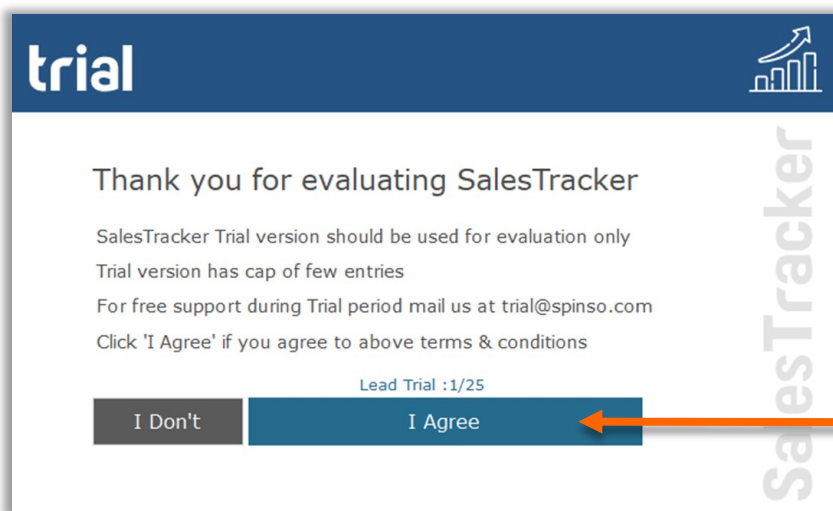
1. Index _____ Pg 2
2. Go To Follow Up Screen _____ Pg 3
3. Entering a Follow Up _____ Pg 6
4. Additional Information _____ Pg 10

2

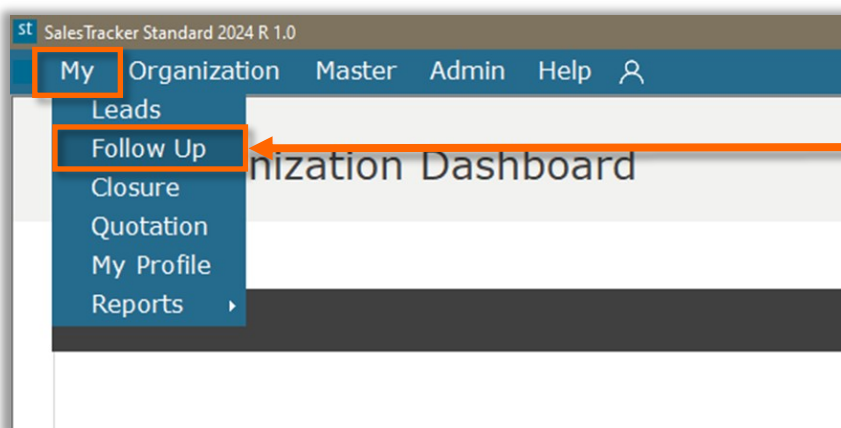
Go To Follow Up Screen



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

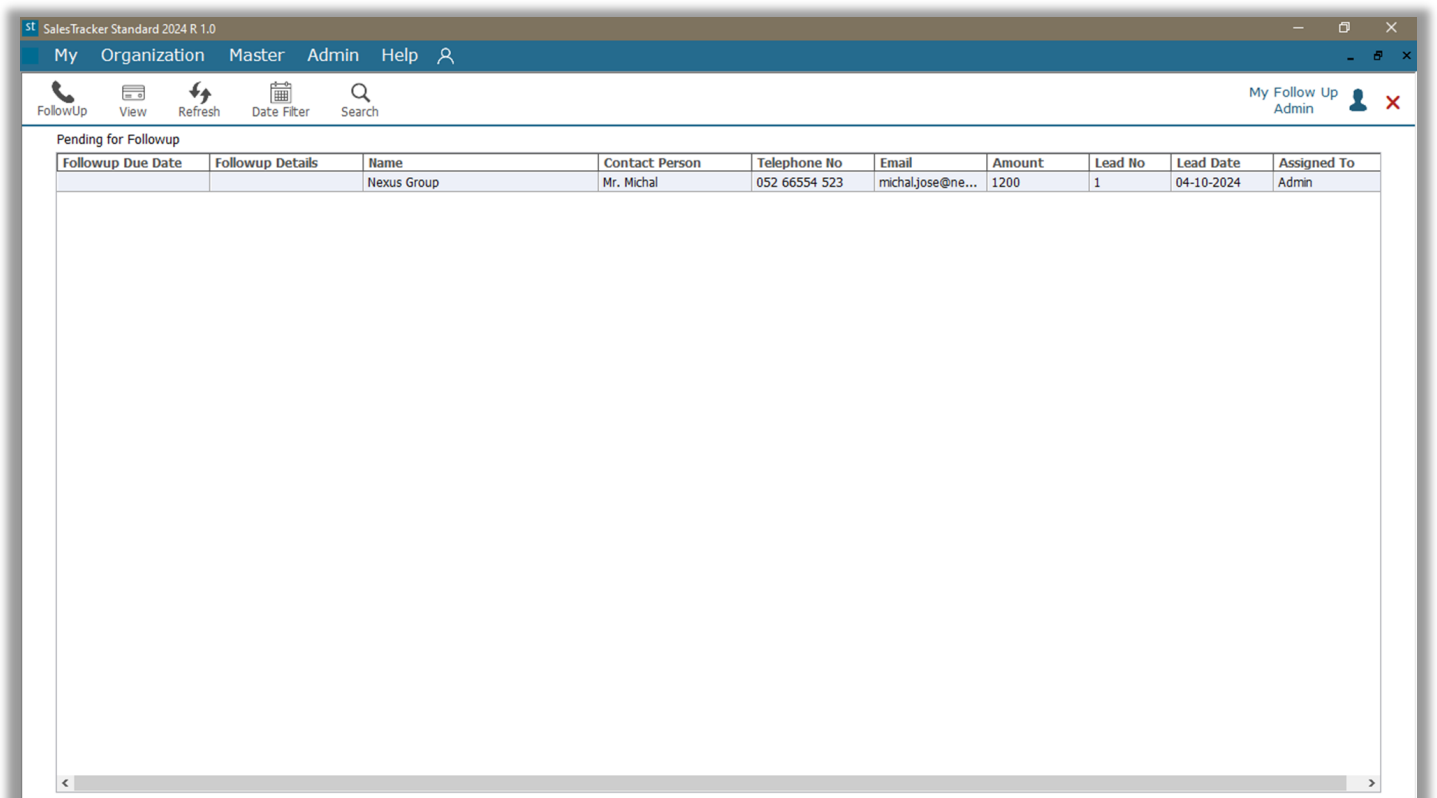


Click on **I Agree**



Go to
My > Follow Up

Follow Up Screen

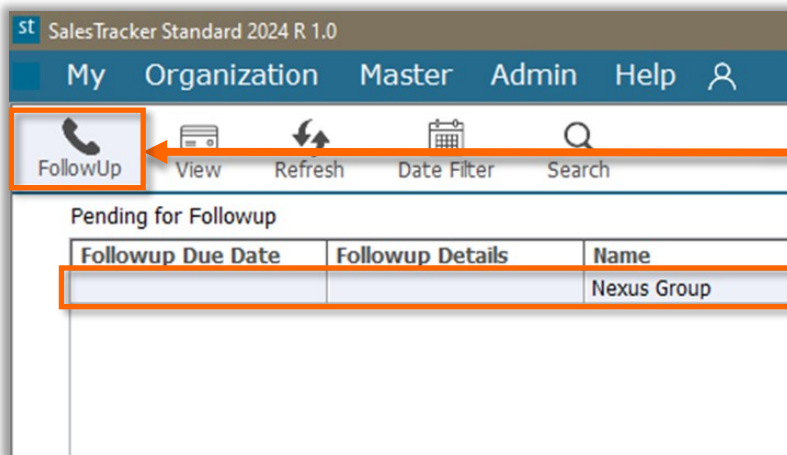


The screenshot shows the 'Follow Up' screen in SalesTracker Standard 2024 R 1.0. The interface includes a menu bar with 'My', 'Organization', 'Master', 'Admin', and 'Help'. Below the menu is a toolbar with icons for 'FollowUp', 'View', 'Refresh', 'Date Filter', and 'Search'. The main content area is titled 'Pending for Followup' and contains a table with the following data:

Followup Due Date	Followup Details	Name	Contact Person	Telephone No	Email	Amount	Lead No	Lead Date	Assigned To
		Nexus Group	Mr. Michal	052 66554 523	michal.jose@ne...	1200	1	04-10-2024	Admin

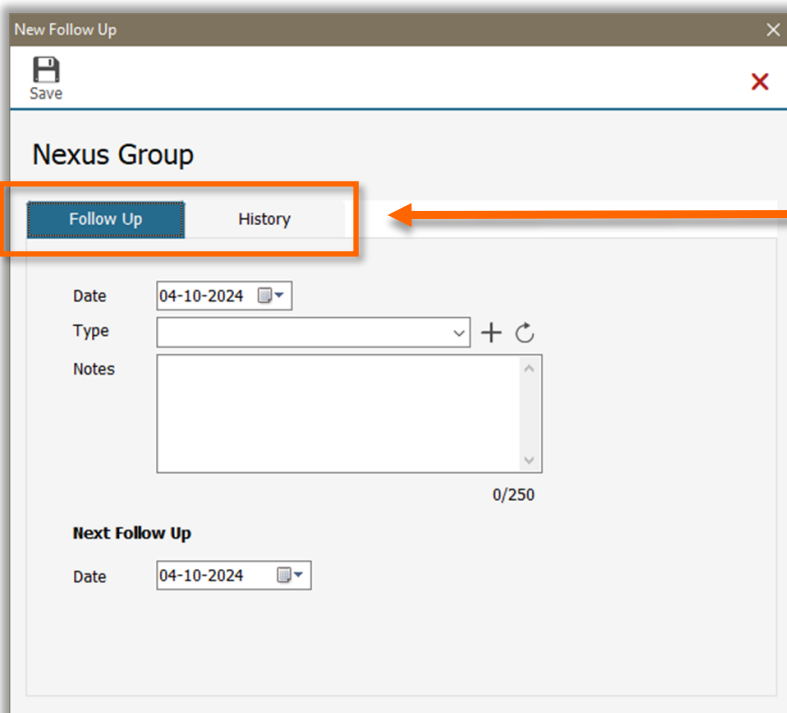
3

Entering a Follow Up



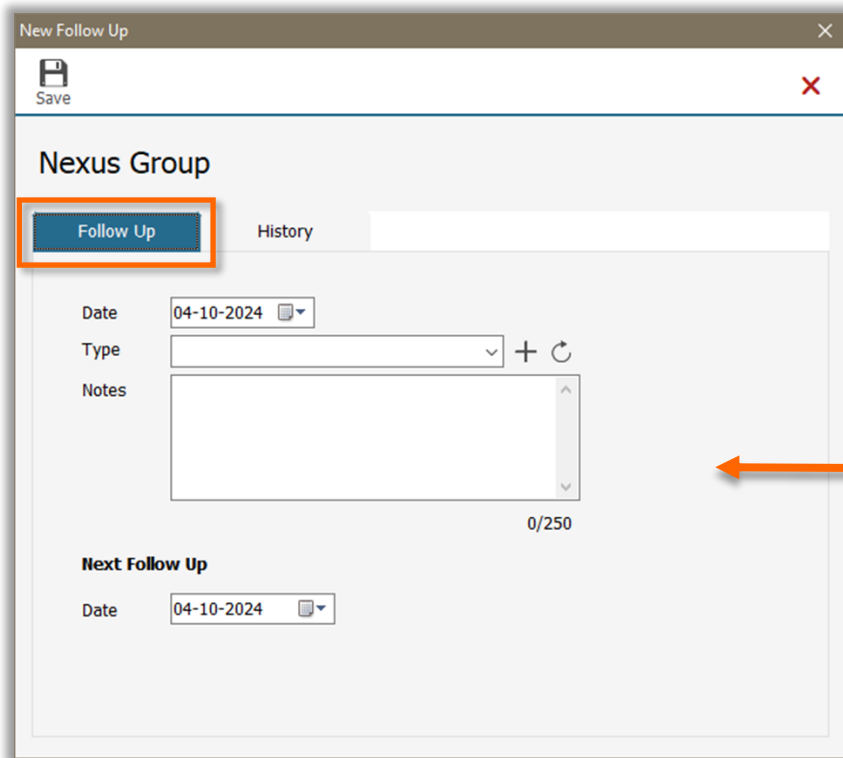
In the Follow Up screen, Select a record from the list then click on **Follow Up**.

New Follow up window will open.



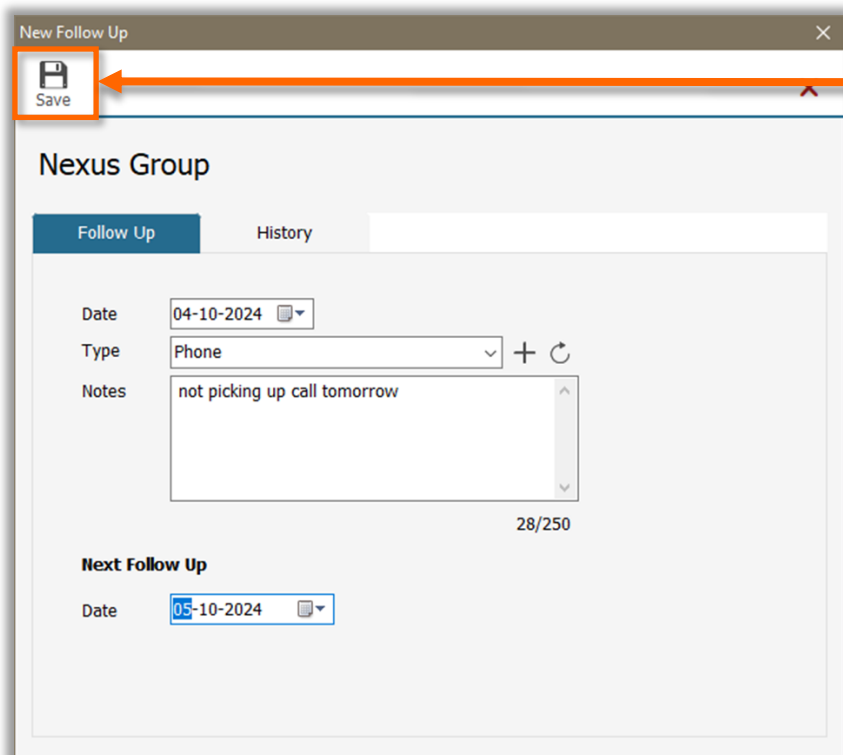
Here, we can see two tabs:

- **Follow Up** : Here we enter follow up details.
- **History** : Here we see previous follow up details, if any.



Enter Follow Up details:

- Select Follow Up Type
- Enter any notes or remarks
- Update Next follow up date.



Click on **Save**.

New Follow Up

Save

Nexus Group

Follow Up History

Date: 04-10-2024

Type: Phone

Notes: not picking up call

Next Follow Up

Date: 05-10-2024

28/250

SalesTracker

Followup Saved

OK

Follow up record is saved
Click on **OK**.

SalesTracker Standard 2024 R. 1.0

My Organization Master Admin Help

FollowUp View Refresh Date Filter Search

My Follow Up Admin

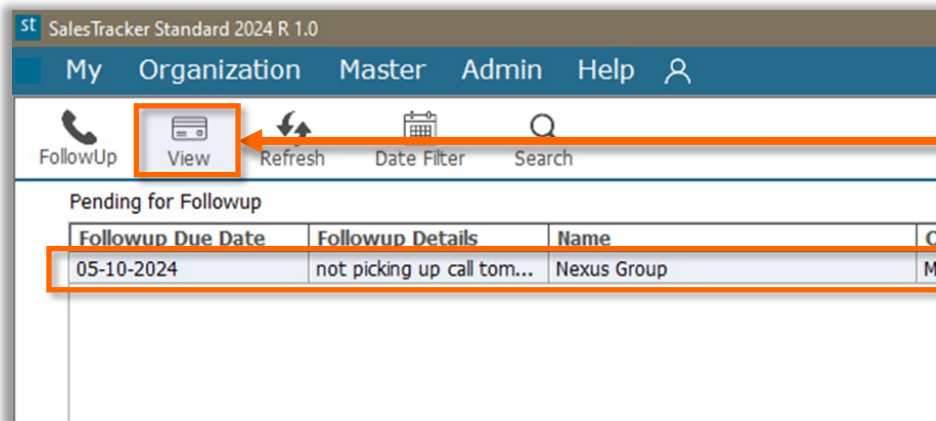
Pending for Followup

Followup Due Date	Followup Details	Name	Contact Person	Telephone No	Email	Amount	Lead No	Lead Date	Assigned To

- Since we entered and saved a follow up, that record will be removed from this list.
- The record will be fetched again on Next follow up due date.
- Therefore, follow ups that are due for today or was pending will be seen in this list.

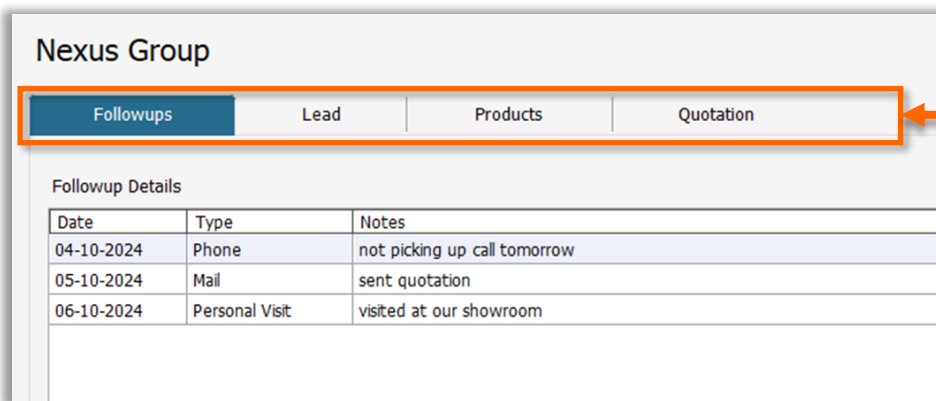
4

Additional Information



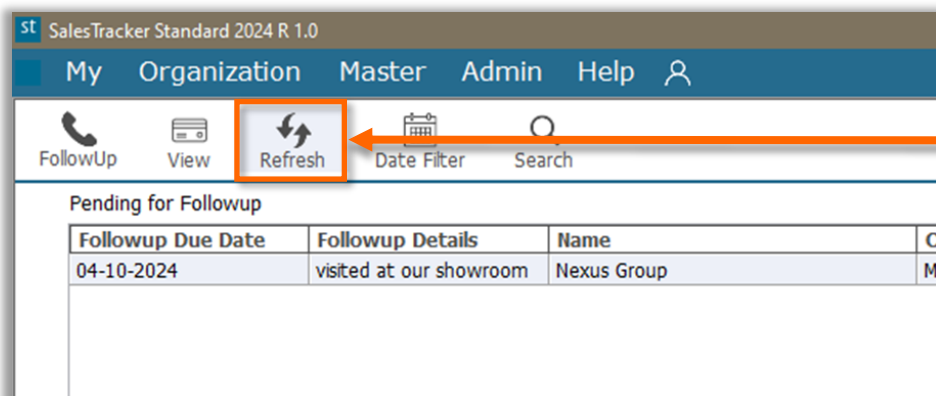
View:

Selecting a record from the list, then clicking on view button will give detailed view of lead and its follow ups, products and Quotation.



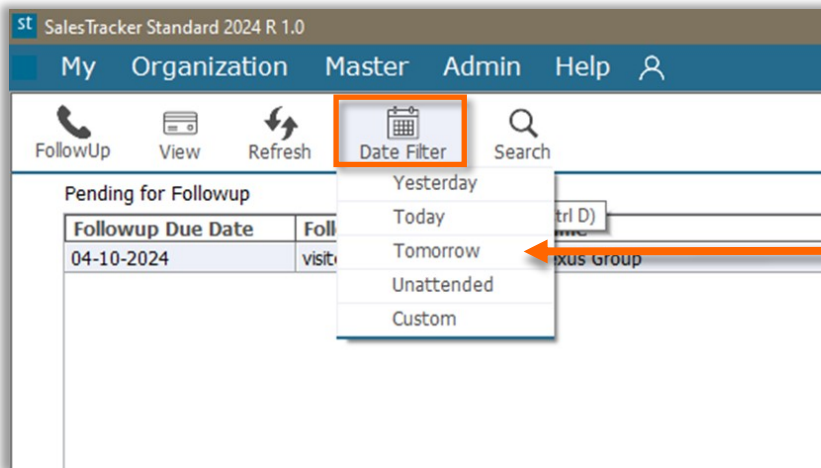
Follow up View button Shows

- Follow ups records
- Lead details
- Products details
- Quotation



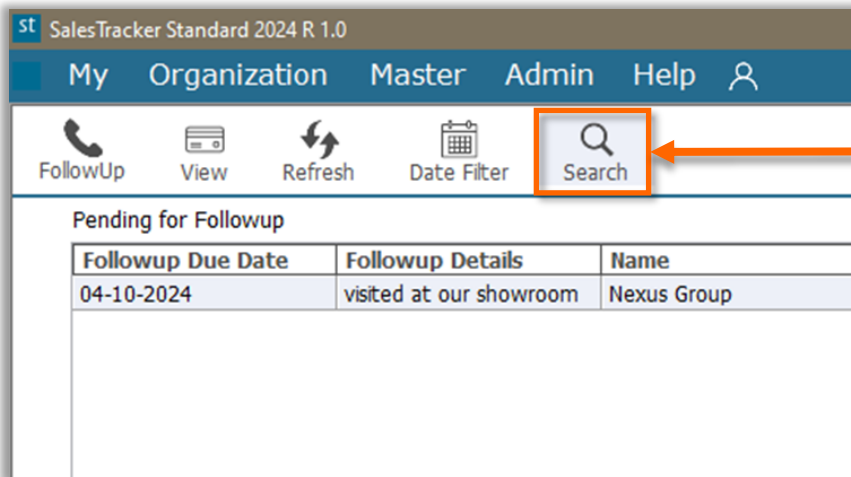
Refresh:

Refresh the screen to load data again or to reset settings/filters.

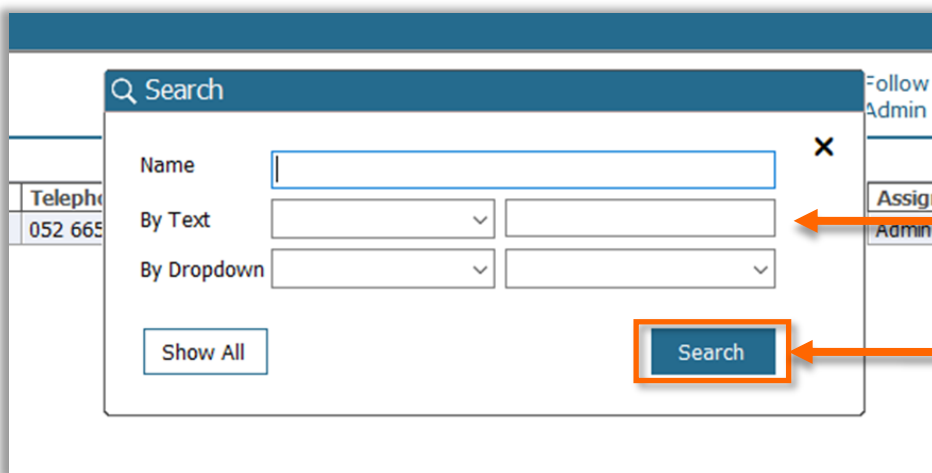


Date Filter: This button helps you to filter and show the Follow Up records for the given date.

Custom date filter lets you to view follow ups of a particular period of time.



Search: This button helps to search/find follow ups by name or other details like source, product or notes etc.



Enter lead name, source, product etc.
Click on **Search**.

SPINSO[®]

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 quotation** Help file Next.

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