



Standard edition

SalesTracker

manage leads & follow-ups



Your first lead closure (Trial Edition)

Step by step guide on your first lead closure in SalesTracker Standard.

1

INDEX

Steps

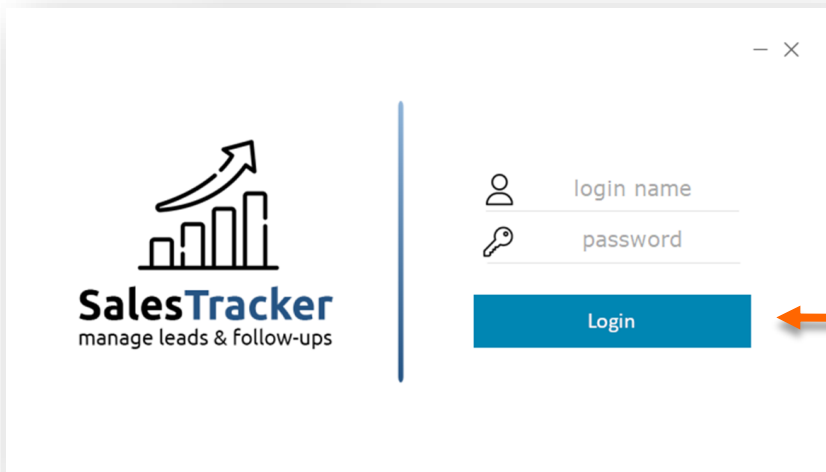
1. Index _____ Pg 2
2. Login _____ Pg 3
3. Your first lead closure _____ Pg 4

2

Login



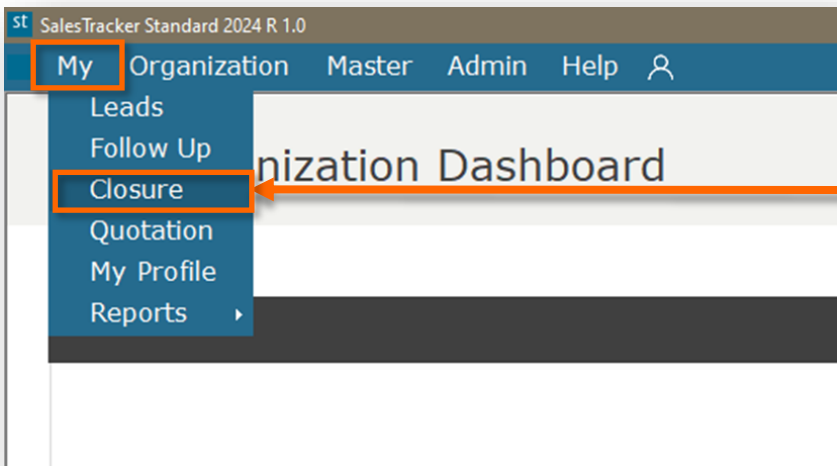
Start **SalesTracker**.



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

3

Your first Lead closure



st SalesTracker Standard 2024 R 1.0

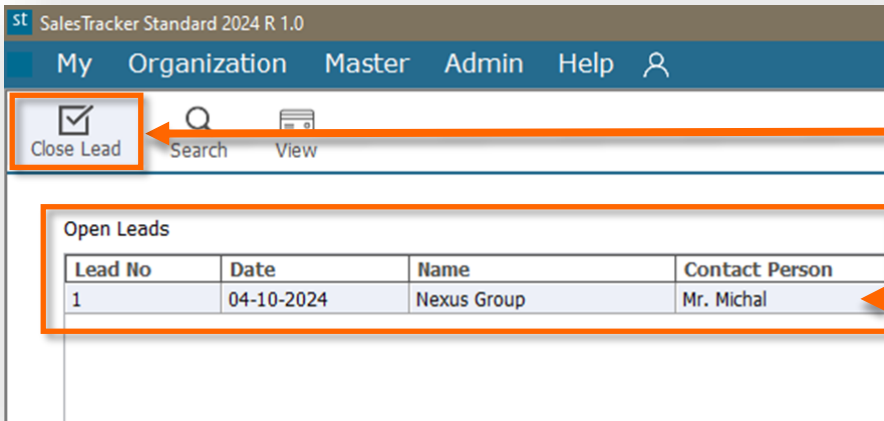
My Organization Master Admin Help

Close Lead Search View

My Closure Admin

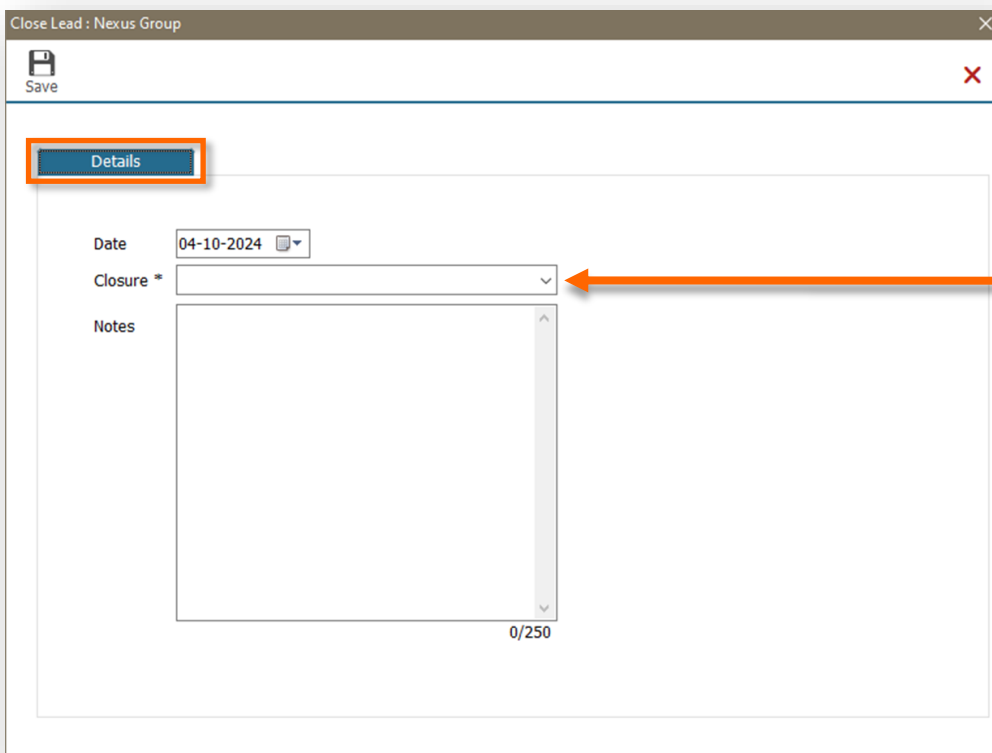
Open Leads

Lead No	Date	Name	Contact Person	Amount	Source	Assigned To	Notes
1	04-10-2024	Nexus Group	Mr. Michal	1200	Website	Admin	required 100 copy per day



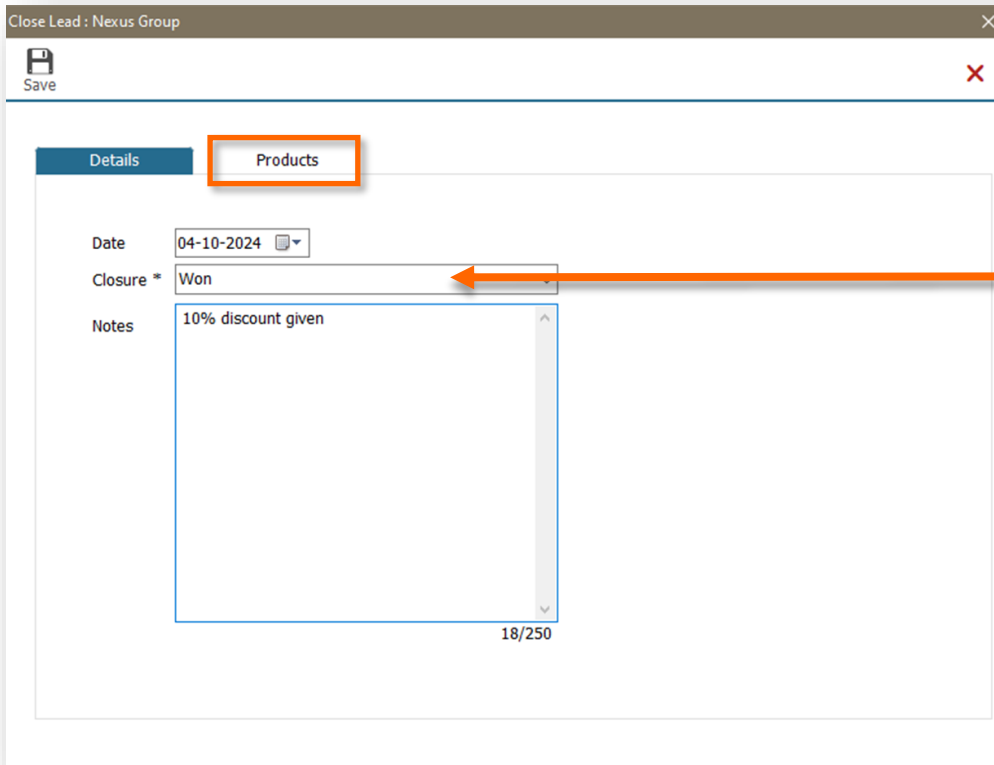
1. Select/Click the lead you want to close
2. Click on **Close Lead**.

Close Lead window will open.

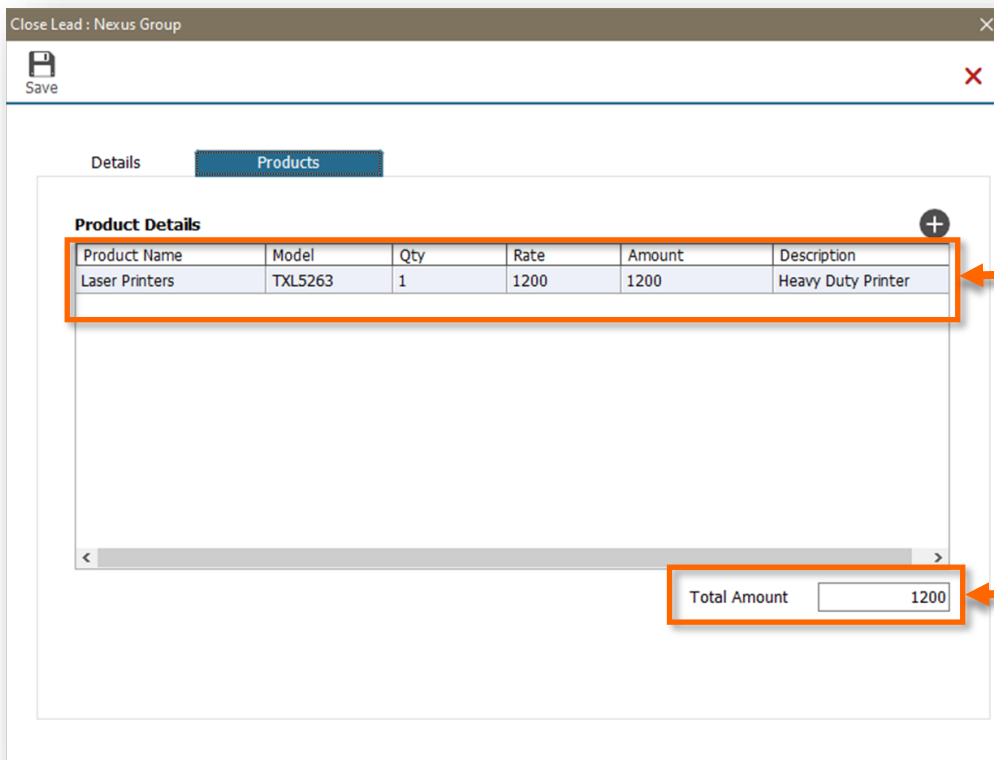


Fill in the Details Tab:

- Set Date
- Select Closure type [Won, lost, Cancel]
- Enter any Notes/Remarks.

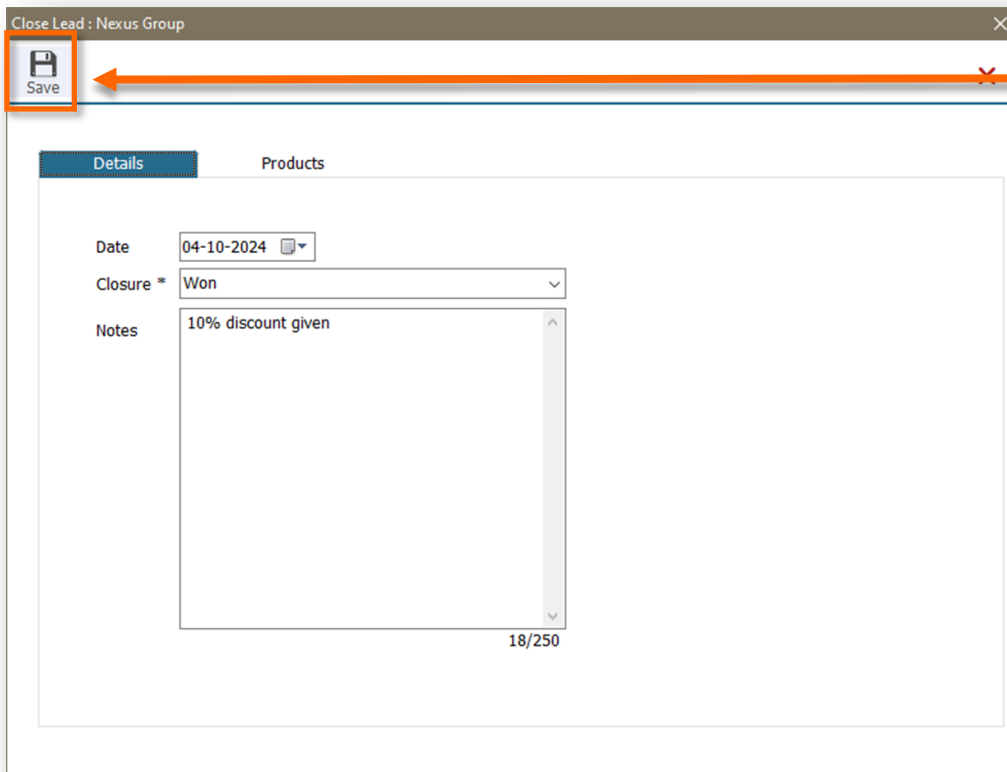


Since we selected **Won** in Closure, **Product** Tab is Active

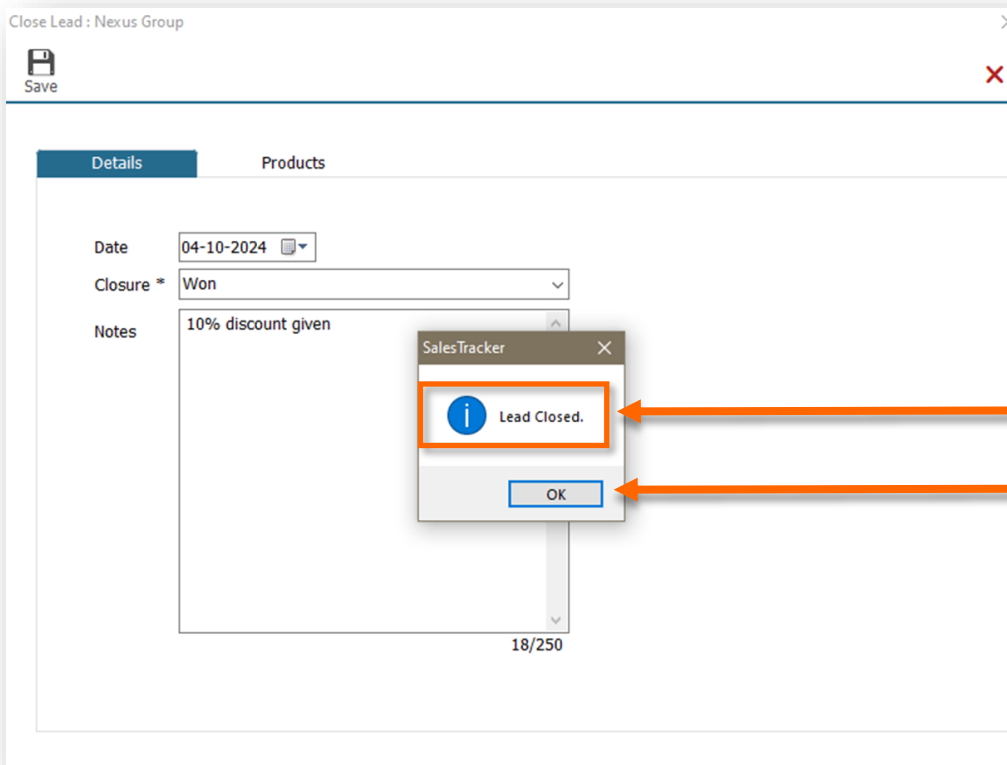


We can see lead's

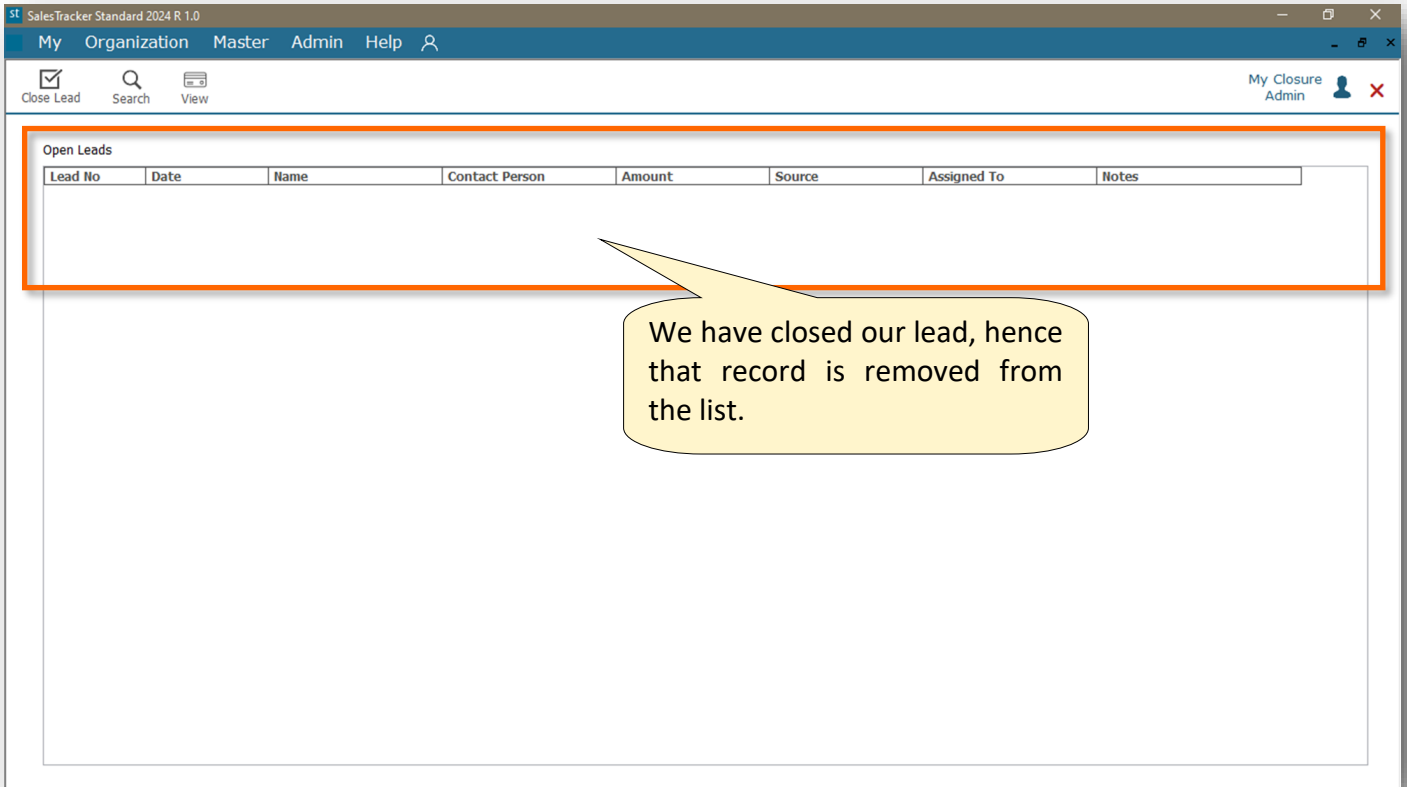
1. product list
2. total amount.



Click on **Save**.



Congratulations, you have closed your Lead Successfully. Click on **OK**.



SalesTracker Standard 2024 R 1.0

My Organization Master Admin Help

Close Lead Search View My Closure Admin

Open Leads

Lead No	Date	Name	Contact Person	Amount	Source	Assigned To	Notes
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We have closed our lead, hence that record is removed from the list.

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 **How to View Reports** Help file Next.

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