

SPINSO



Your first lead closure (Trial Edition) Step by step guide on your first lead closure in SalesTracker Standard.

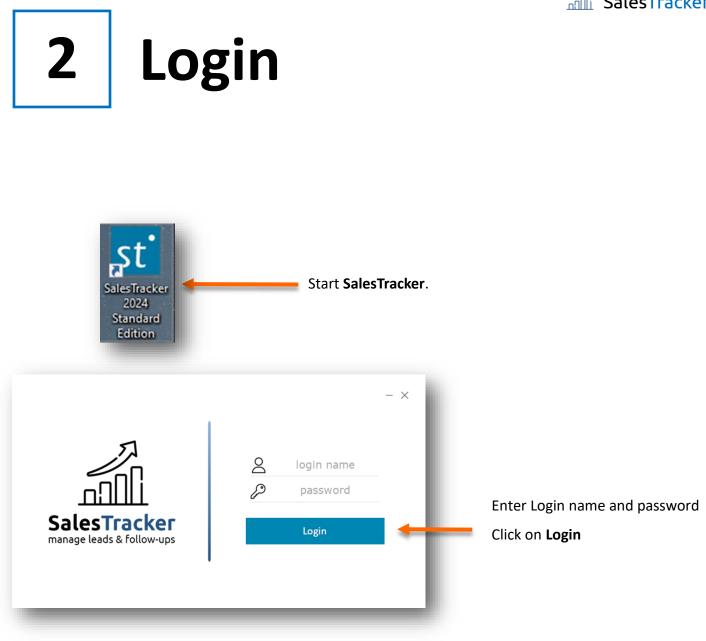




Steps

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3

Your first Lead closure

St SalesTracker Standard 2024 R 1.0	
My Organization Master Admin Help 久	
Leads	Cata
Follow Up nization Dashboard	Go to
Closure	My > Closure
Quotation	
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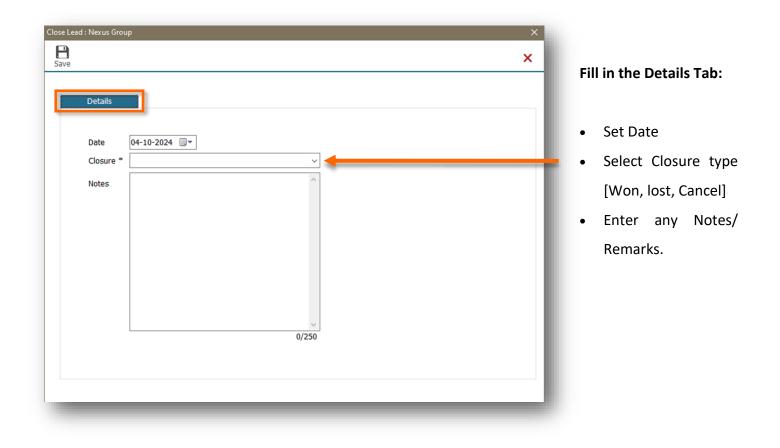
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oen Leads								
ead No	Date	Name	Contact Person	Amount	Source	Assigned To	Notes	
	04-10-2024	Nexus Group	Mr. Michal	1200	Website	Admin	required 100 copy per day	



My Orga	nization Mas	ter Admin Help	<u> </u>	
				-2
se Lead Se	arch View			
Open Leads				1.
·				-
Lead No	Date	Name	Contact Person	2.
	04-10-2024	Nexus Group	Mr. Michal	
1				
1				Clos
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- 1. Select/Click the lead you want to close
- 2. Click on Close Lead.

Close Lead window will open.



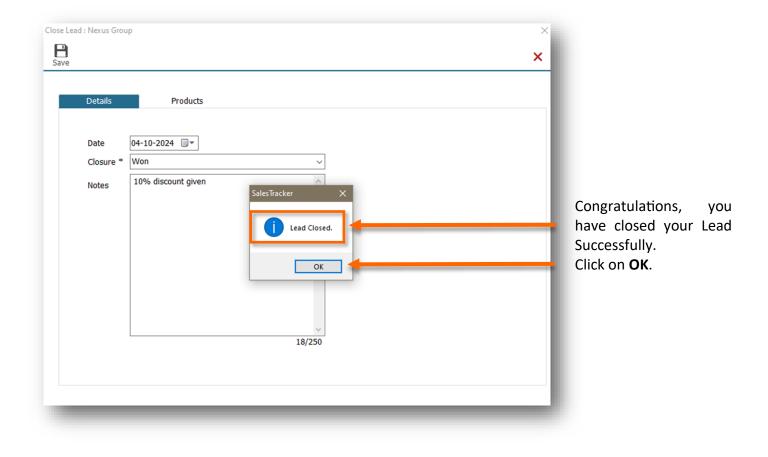


Close Lead Bave	l : Nexus Grou	p		× ×	
	Details	Products			
	Date	04-10-2024			
	Closure *	Won			Since we selected Won
	Notes	10% discount given	^		in Closure, Product Tab
					is Active
			<u> </u>		
			18/250		

Product Name Model Qty Rate Amount Description Laser Printers TXL5263 1 1200 1200 Heavy Duty Printer 1 1 product	Details Products roduct Details Product Name Model Qty Rate Amount Description I product list
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Close Lead : Nexus Gro	up	Click on Save.
Details	Products	
Date	04-10-2024 🔲 🖛	
Closure *	Won	
Notes	10% discount given	





SalesTracker Standard 2024 R 1.0	– o ×
My Organization Master Admin Help റ	_ 8 ×
Close Lead Search View	My Closure 💄 🗙
Open Leads Lead No Date Name Contact Person	Amount Source Assigned To Notes
	We have closed our lead, hence that record is removed from the list.

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 How to View Reports Help file Next.

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