SPINSO

Standard edition

SalesTracker

manage leads & follow-ups

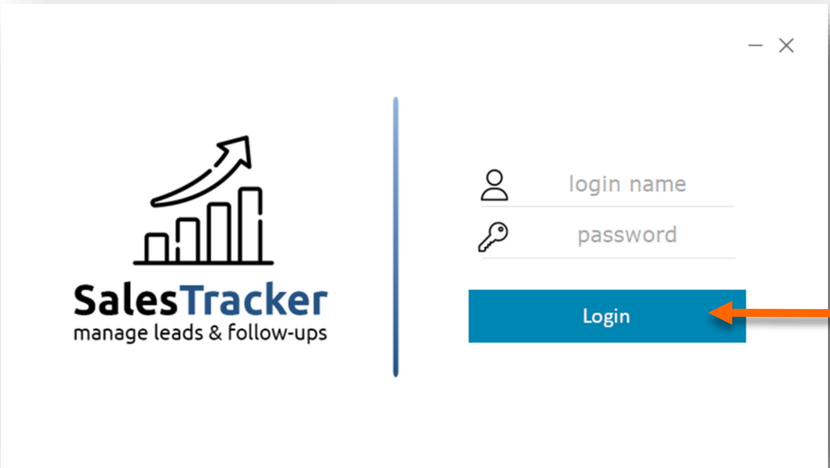
Lead Screen Interface (Trial Edition)

Guide on Lead Screen Interface in SalesTracker Standard.

1 INDEX

2 Login

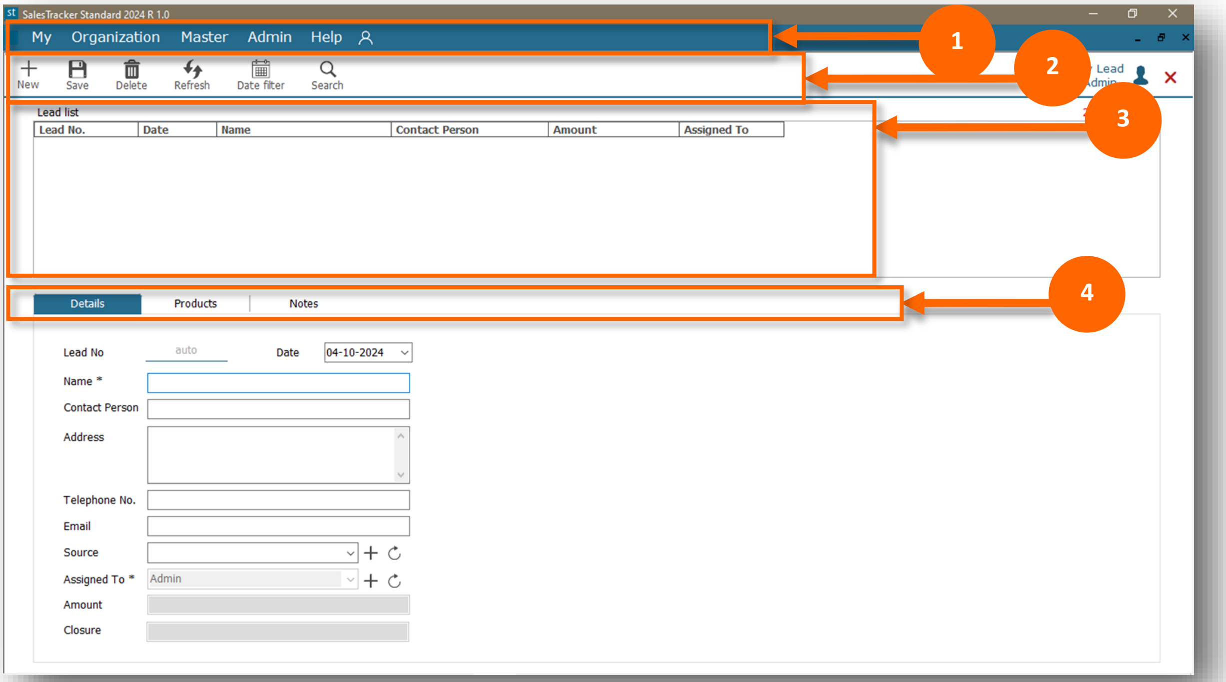
Start **SalesTracker**.



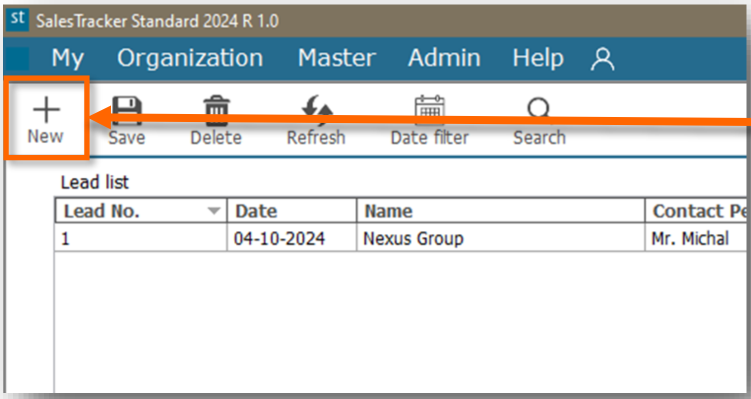
Enter Login name and password

Click on **Login**

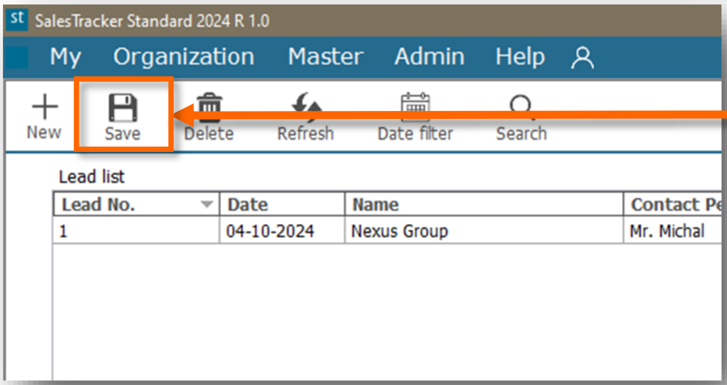
4 Lead Screen Interface



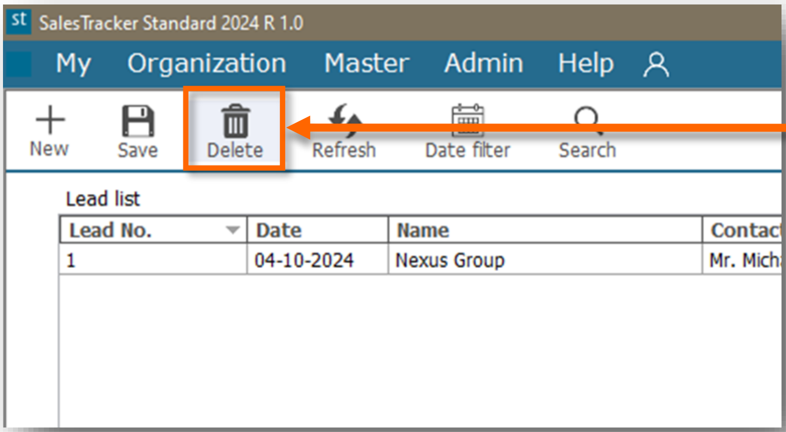
1. Menu Bar: Navigate to different screens through these menus.
2. Tool Bar: Smart tools to help manage lead easier and faster.
3. Lead list: View all your leads in this list.
4. Tabs: Use the fields of these tab to enter details then save or edit lead. Once saved, these details can be retrieved by selecting the lead from the list or by entering the lead no. in Details tab.



New: Clear the fields and set them as blank. Used while entering a new complaint.

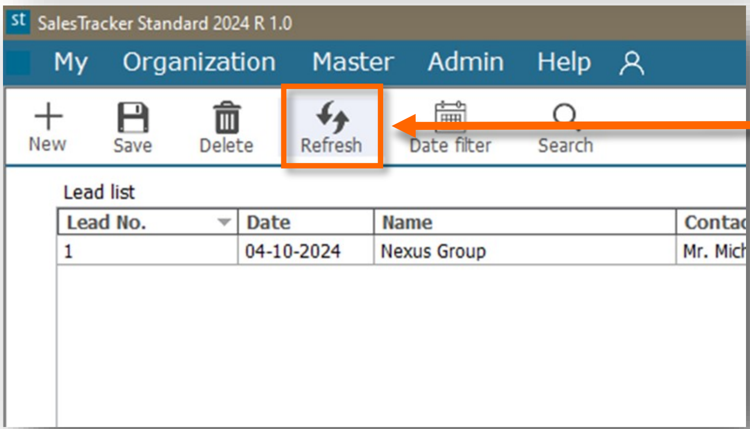


Save : Click on this button to save the complaint.

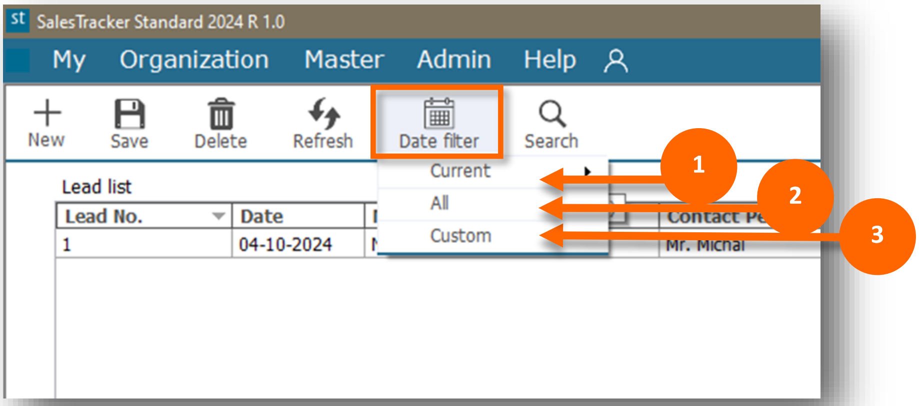


Delete :

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



Refresh : to refresh the screen

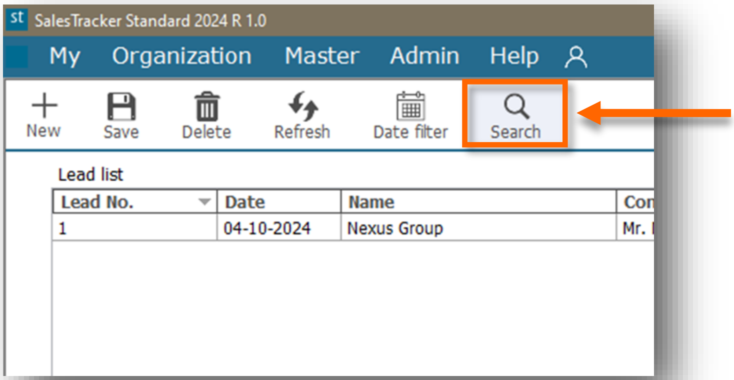


Date Filter: This button helps you to filter and show the lead from the given period of time.

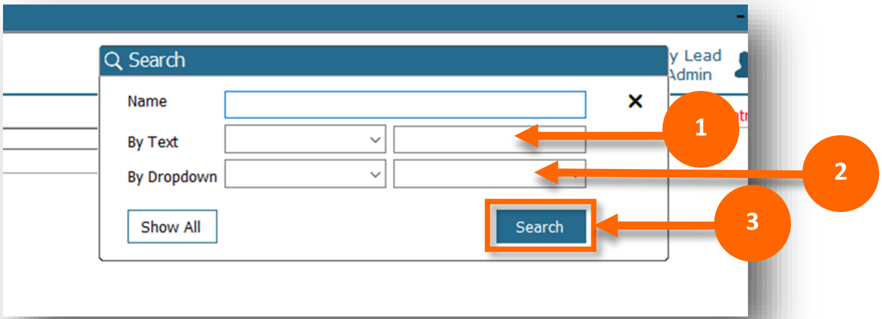
1. Current: Shows current data

2. All Shows all the data

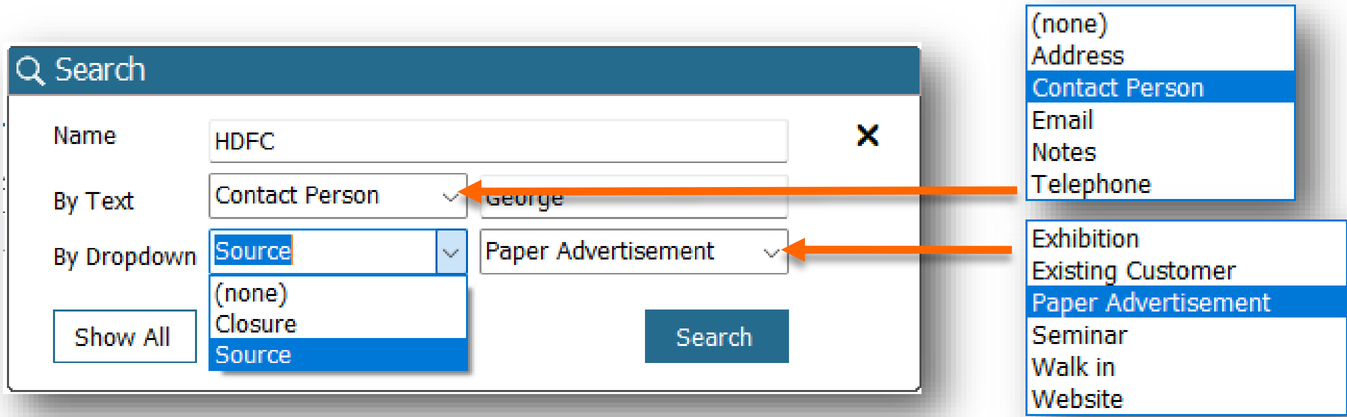
3. Custom date filter lets you to view leads from a particular period of time.



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



Enter Name.
Or
1. Enter text like Contact Person or address.
Or
2. Select Source or Closure Type.
3. Click on **Search**



Thank you

We hope this was successful. Kindly Call us or WhatsApp +91.99 201 401 00 for any queries.

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