Getting Started with EQMS Lite

Quick start guide for EQMS Lite : Free sales CRM

sales crm

EQMSlite

a free CRM for every business

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Getting Started

2 Introduction

EQMS Lite is a free sales CRM to manage enquiries in 3 easy steps

1 Enquiry/Lead → **2** Follow-ups → **3** Closure

EQMS Lite, is a simple, ready to use sales management system, to streamline your sales process and increase productivity.

EQMS lite is a windows based application.

It has a small setup file **of 8 MB**, which can be downloaded from our website.

It is a ready to use product. Hence the installation is simple and you can immediately start using it.

Unlike other CRM applications accessing EQMS lite is much more easier.
The data resides on your computer and works without internet.

EQMS Lite can be downloaded from our official website
SpinsoLite.com or SpinsoLite.in

You do not need register the product for free use no credit card or payment is needed
Just download and install and you are good to go

Your data on
your pc/laptop

3 Installation

EQMS Lite can be installed on Single PC or laptop, this is a single user application

✔ Data and application is locally stored

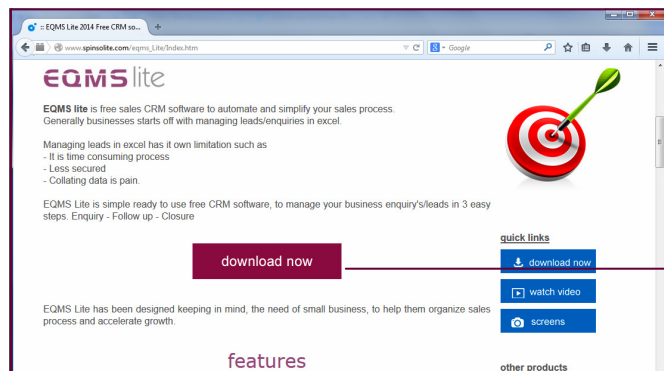*✔ you don't need internet to access the data*

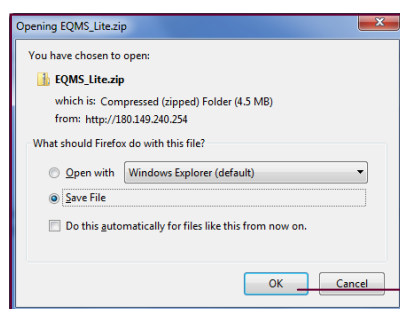PC   or   laptop

Prerequisite
Operating system Windows Xp or later (Windows 7 recommended)
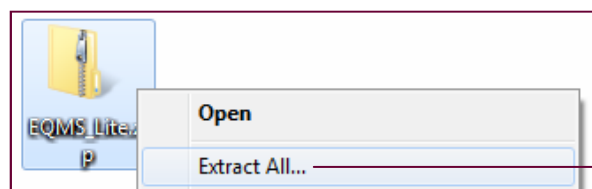Dot net 2.0 *free runtime from Microsoft available on our website*

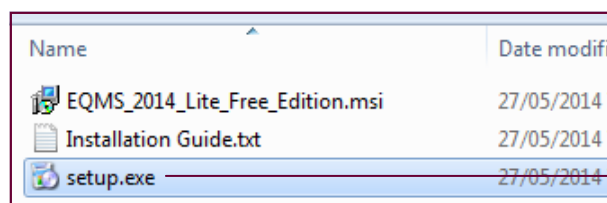To download and install visit
SpinsoLite.com or SpinsoLite.in

1 Click on "**Download Now**" button

2 Save to your desktop

3 Extract Zip file

Name	Date modifi
EQMS_2014_Lite_Free_Edition.msi	27/05/2014
Installation Guide.txt	27/05/2014
setup.exe	27/05/2014

4 Run **Setup.exe** to install
Follow installation instruction

EQMS 2014 Lite (Free Edition)

5 **EQMS Icon** would appear on the desktop

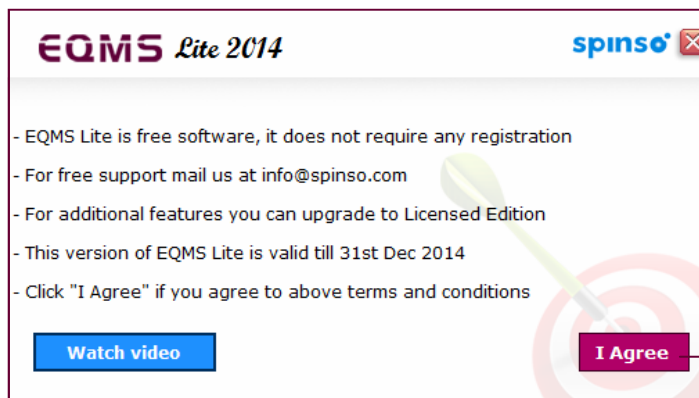# 4 Getting Started

After you install EQMS Lite you can click on the EQMS Lite icon on your desktop to launch the application

EQMS Lite login screen would open
Click on **Login**

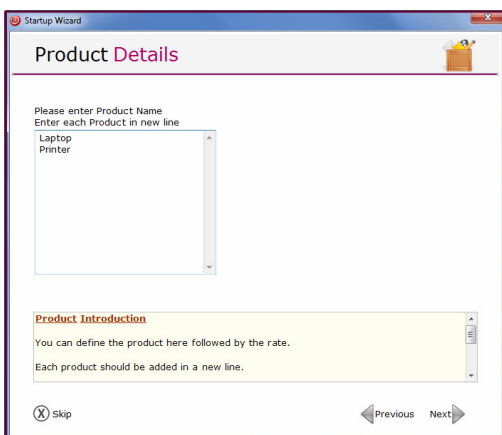Click on **I Agree** to continue

5 Wizard

Once you login to EQMS Lite for the first time a welcome wizard would help you create master entry so that you can start using EQMS Lite

You can modify this master later from their respective master screens
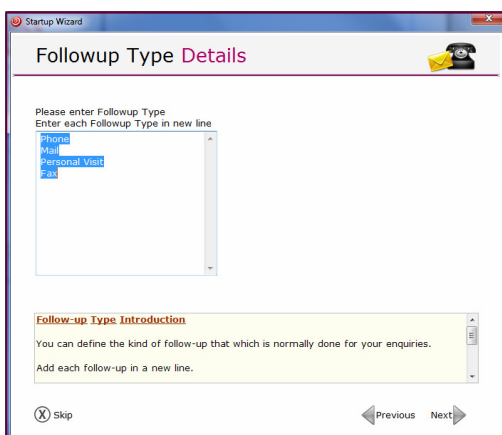
Click **Next** to continue

You can enter your product name here
Multiple product details can be entered here using enter key

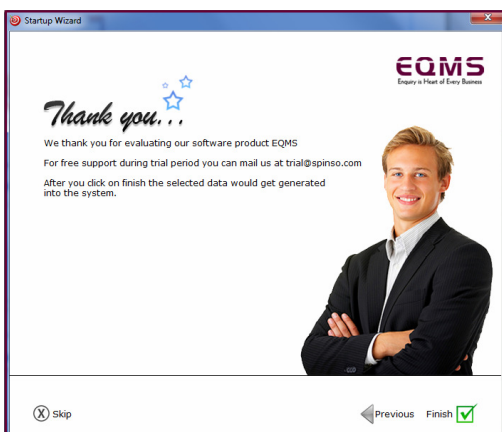**Sample Data**
Laptop
Printer

Click **Next** to continue

You can enter your follow-up type here
Multiple follow-up types can be entered here using enter key
By default values are populated, these can be changed

Sample Data
Phone
Mail
Personal Visit

Click **Next** to continue

When you click finish respective master data would be created

Click **Finish**

6 Enquiry/Lead

1 Enquiry/Lead

In Enquiry/Lead screen you can capture the leads that are generated from various sources such as Newspaper Advertisement, Internet Advertisement, Cold Call. Proper Management of lead information enables you to analyze and track product or source that generate more leads/enquiries. It also helps you to store the customer contact details in an organized way, so that it is easily available whenever needed.
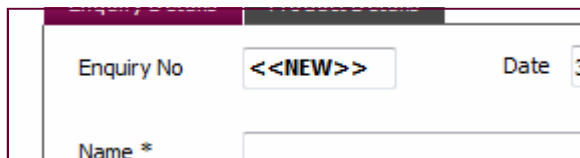
Entering First Enquiry/lead
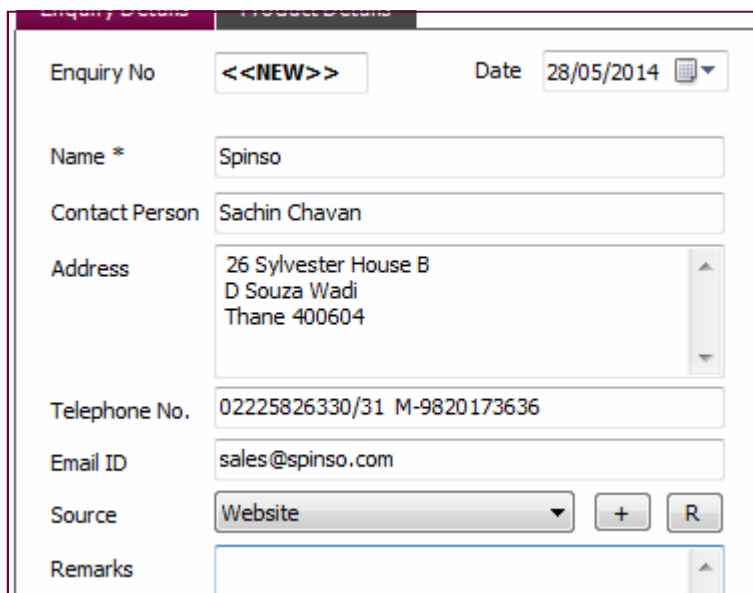
1 Open **My-Enquiry/Lead** menu
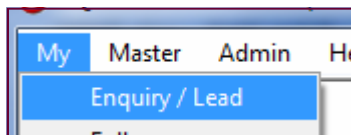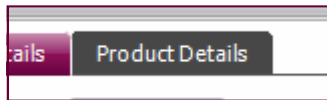

2 By default it would be in the **<<NEW>>** mode
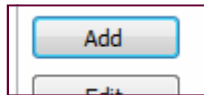

3 Enter Enquiry/lead details

4

You can also enter product details (optional)
To enter products, select **Product Details** tab

5

Click on **Add** Button

6

Product Details window would open, Select Product and select **Ok**

Selected product would be added to your list
You can add more product by clicking on **Add** button

Product Name	Qty	Rate	Amount
Laptop	1	5000	5000

7

To save the details click on **Save** Button
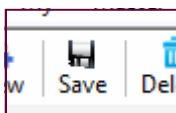
8

You would see the following message **Enquiry No.1 Saved !**
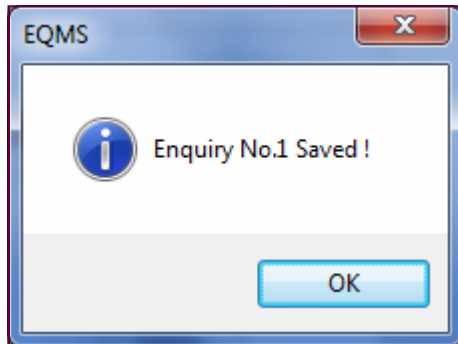This indicates you data is saved and new number is generated
for this enquiry that is 1.
Click on **OK**

For the next enquiry the number 2 would be generated

9

You would see enquiry no 1 added

Enquiry List

Enquiry No.	Date	Customer Name	Contact Person Name	Address	Telephone
1	28/05/2014	Spinso	Sachin Chavan	26 Sylvester House ...	022258263

You can also
- Modify Enquiry/Lead details
- Delete Enquiry/lead
- Search/Filter enquiry/lead list

2 Follow-ups

Most of the deals are lost to competitors due to less follow-up or over follow-ups. Proper management of follow-up information prevents leads, from going cold. Follow-up screen enables you to record the complete details of follow-up such as mode of follow-up if it is phone, email or a personal visit and so on, date and time of follow-up, brief about the communication done and the next follow-up details. It also provides you the entire history of lead follow-up in a single glance.

Entering First Follow-up

1   Select the Enquiry from the **Pending for follow-up** List

Pending for Followup ☐ Show All

Enquiry No	Enquiry Date	Customer Name	Address	Telephone	Next Followup Date
1	28/05/2014	Spinso	26 Sylvester ...	02225826330...	30/05/2014

2   Details of selected enquiry would be displayed in below **Followup Details** Tab

Followup Details

Name	Spinso
Contact Person	Sachin Chavan
Telephone	02225826330/31 M-9820173636
Email ID	sales@spinso.com
Product Enquiry For	Laptop

3   Click on **Add** button

Add

4

Enter the Follow-up details

Note : Select **Next follow-up date** this would be the date when you would want to be reminded for the follow-up. In the below case the system will remind me on 06/06/2014

Click on **Save**

Message appears **Record Saved**
Click **Ok**

5

Note: Enquiry no 1 would be removed from the **Pending for follow-up** List and it will appear only after 06/06/2014. Hence even if you have 500 enquires, this list would only populate the enquires that are pending for follow-up

6

If you wish to view all open enquires then you can click on **Show All**, this would show all open enquires in the **Pending for follow-up** List

You can also do the following
- Modify follow-up details
- Delete Follow-up details
- Search for enquiries/lead

8 Closure

3 **Closure** After series of follow-up the lead is moved to the final stage that is closure. Managing closure details enables you monitor and track the overall sales performance. EQMS Lite lets you track the status of lead/enquiry i.e. **Booked**, **Lost** or **Cancelled** along with the status reason for winning or losing the deal.

1. Booked : When you win the deal, it is tagged as "booked"
2. Lost : When a deal is lost to a competitor, such leads can be tagged as "lost"
3. Cancelled : Lead can be cancelled in the following cases. If the prospect has enquired for the product, but has dropped his purchase requirement, Or duplicate data, can be marked as cancelled.
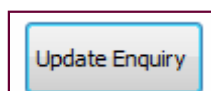
Closing an Enquiry/Lead

1 Select the enquiry form the **Enquiry Closure** List

Enquiry Closure

EnquiryN	EnquiryDate	EnquiryTime	Customer	Address	TelephoneNo
1	28/05/2014	15:37	Spinso	26 Sylvester Hous...	02225826330/3...

2 Click on **Update Enquiry** Button

Update Enquiry

3 Enter closure details

4 Click on **Save** Button

Save

Update Enquiry Status

Save   Close

Date   30/05/2014
Status *   Booked
Remarks   Discount of 10%

Product Details

Product Name	Qty	Rate	Amount
Laptop	1	5000	5000

Total Amount   5000

Note
Once you update the closure status the enquiry would be removed from the closure list.
Also the enquiry would not appear in follow-up as follow up action is needed for the enquiry.

9 Reports
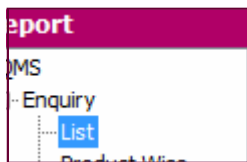
Reports give you the insight of sales performance.
The data in report can be exported to excel, for further visualization and analysis

You can use this data to build custom reports, pivots, mail merge etc

View reports & Export to Excel

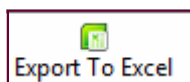**1** Select the report for the report list

2 Data of selected report will be displayed in the list

Report

Enquiry List

Enquiry No	Enquiry Date	Customer Name	Contact Person	Address	Telephone	Email ID	Source	Amount
1	28/05/2014	Spinso	Sachin Chavan	26 Sylvester Ho...	02225826330/3...	sales@spinso.co...	Website	5000

3 Click on Export to Excel if you wish to export the data

Export To Excel

Other free software's

project timesheet

TIMETracker lite

service crm

service desk lite

spinsolite.com