



Getting Started

Quick start guide for SalesTracker Professional Edition

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Introduction to SalesTracker

SalesTracker CRM helps you organize your sales process, thus letting you focus on more important activities and increase productivity

SalesTracker is ready to use Sales CRM software, to easily manage the entire lead lifecycle.

SalesTracker is a smart and intuitive tool for sales lead management which helps you manage leads in an effective and organized way.

It is a client-server application and can be accessed by multiple pc's within local computer network.

You can upgrade to higher edition for more features.

For free support mail us at info@spinso.com

Typically Sales lead management involves 3 important stages, which are covered in SalesTracker.

It covers 3 important stages i.e.

- Lead
- Follow Up
- Closure

3 Wizard

Introduction

The wizard screen lets you quickly enter basic details required to create masters. This screen will appear only once when you login to the system for first time.

The step by step instructions in the wizard guides you to enter master data like Employee, Product, Follow Up Type, Region and Status Reason so that you can immediately start adding Leads.

Data entered through wizard can be seen in Master screen. You can also further add or modify these details later in the respective masters.



3.a

How to enter data in Wizard

Welcome Screen



The first screen that appears in the wizard is the welcome screen, it is a start-up screen that gives brief introduction about the wizard.

Click on **Next** button to Continue

Admin's login details



A default login and password for the user **admin** is already defined by the system.

However you can change the credentials such as login name & password for the user **Admin** here.

Sample Data

Login Name : Admin

Password :

ReEnter Password :

Click on **Next** button to continue



Please note :

Details added in the Admin's login details can be changed or you can add more login's from the menu option **Master → Employee (Users)**.

Business Type



Select your business type listed in the drop-down. Selecting the appropriate business type will further give you list of relevant sample products, brand & its complaint type, so that you can quickly get started.

Click on **Next** button to continue

Sample Data

IT & Networking
Machinery & Equipment's
Medical Equipment's
Airconditioning



Please note :

Details added in the business type can not be changed later.

Employee



In employee wizard you can enter Employee/User names.

Enter each Employee Name in new line.

You can enter number of Employee/Users as per license purchased.

By default **Login Name** and **Password** would be automatically generated for employee.

Click on **Next** button to continue

Sample Data

John Smith
Rita Singh



Please note :

Details added in the Employee wizard can be changed or you can add more Employees from the menu option **Master → Employee (Users)**.

Product



In Product wizard you can enter Product for which you are entering Lead.

Each product should be added in a new line.

Click on **Next** button to continue

Sample Data

Computer
Laptop
Server
Printer
Air conditioner
Water cooler



Please note :

Details added in the Product wizard can be changed or you can add more product categories from the menu option **Master → Product** .

Brand



You can define Brand for the product.

Enter each brand in new line.

Click on **Next** button to continue

Sample Data

HP
Dell
LG



Please note :

Details added in the Brand wizard can be changed or you can add more brands from the menu option **Master → Brand** .

Region



In Region wizard you can enter Region Names.

Enter each Region in new line.

You can enter city like Bangalore, Delhi, Mumbai and Chennai or Country like India, US, South Africa and UK

Click on **Next** button to continue

Sample Data

India

UK

South Africa



Please note :

Details added in the Region wizard can be changed or you can add more regions from the menu option **Master → Parameter** .

Follow Up Type



You can enter different methods of communication with the prospective customer such as phone, email etc.

Default Follow up Type list is given, you can modify the list or add more Follow up Types.

Click on **Next** button to continue

Sample Data

Phone

Mail

Personal Visit

WhatsApp



Please note :

Details added in the Followup Type wizard can be changed or you can add more Followup Types from the menu option **Master → Parameter** .

Status Reason



In Status Reason you can give various reasons for status of Won/Lost/Cancel.

Each status reason should be added in a new line.

Click on **Next** button to continue

Sample Data

Existing Customer

Good Price

Special Offer

Discount



Please note :

Details added in the Status Reason wizard can be changed or you can add more reasons from the menu option **Master** → **Parameter** .

Report Title



Enter your details like Company Name, Address, Telephone Number, Email Id & Tax No, this option is used as report title for printing.

Sample Data

Name : SPINSO

Address : Odyssey IT Park, Thane

Contact : Tel : 25826330

Tax No. : 27AAVPH3040C1ZX



Please note :

Details added in the Report Title wizard can be changed from the menu option

Admin → **Settings** → **Control Panel**.

Finish Screen



This is the final screen in wizard.

After clicking on finish, respective master data will be created.

This data can also be modified from the Master menu option.

Click **Finish** to start entering data in Leads.

4 Lead Management

Lead generation is the initiation of consumer interest or enquiry into products or services.

Different stages in the lead management are Lead, Followup and Closure.

Lets understand how to manage these stages in detail

- 4.a How to enter Lead
- 4.b How to enter Followup
- 4.c How to Close lead
- 4.d How to view my reports

4.a How to enter Lead

You may receive leads from various sources or activities, for example, digitally via the Internet, through personal referrals, through telephone calls either by the company or telemarketers, through advertisements, and events. Proper Management of lead enables you to easily analyze and track the product, that generate more leads/enquiries.

Steps to enter lead

1. Go to Menu Option **My** → **Leads**
2. **Lead No.** is autogenerated by the system once you save the lead details.
3. **Date** by default would be current date. You can change the date if required.
4. **Time** by default would be current time. You can change the time if required.
5. Enter Customer Name in **Name**.
6. Enter Contact Person name in **Contact Person**.
7. Enter Customer Address in **Address**.
8. Enter Customer Telephone No. in **Telephone No.**
9. Enter Customer Mobile No. in **Mobile No.**
10. Enter Customer E-mail in **E-mail ID**.
11. Enter Customer Website in **Website**.
12. Select **Customer Type** from given list
13. Select **Region** from given list
14. Select **Source** from given list
15. Select **Priority** from given list
16. Select **Stage** from given list
17. Enter name who given reference in **Referred By**.
18. To add Products in Lead, Click on Product Tab, present besides the **Contacts** tab

Steps to add product

- Click on **+** icon.
- Click on **Add**
- Select the **Product**
- Select the **Brand**
- Enter the **Model**
- Enter the **Quantity**
- Enter the **Rate**
- Click on **OK** to Save the product details

You can follow the above steps to add multiple products

19. Click **Save** on the above Toolbar
20. You will receive the save message "**Lead No.1 Saved !**"
This indicates that your lead is saved successfully.
21. Click **OK**

The new Lead will be listed in the above Leads grid.

Lead number is auto generated for New Lead.

This Lead will appear in the Followup screen for entering the Followup.

4.b How to enter Follow Up

SalesTracker enables you to record the complete details of follow-up such as mode of follow-up, date of follow-up, brief about the communication done and the next follow-up details.

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.

Steps to enter followup

1. Go to Menu Option **My** → **Follow Up**
You will see the list of leads which are pending for followups.
2. Select the lead for which you want to enter the followup.
3. Click on **Followup** on the above tool bar. You can also right click on lead and add the followup.
4. **Date** by default would be current date. You can change the date if required.
5. **Time** by default would be current time. You can change the time if required.
6. Select the Followup Type from **Type**
7. You can enter **Notes** to write more details about the followup.
8. Enter next Date in the **Next Follow up** on which you want to call the customer.
9. Click on **Remind me** and set the time if you require pop up reminder on the screen at specific time.
10. Click on **Save**.
11. You will receive **Followup Saved** message
12. Click on **OK**.

After saving the follow-up details the lead will be removed from the pending follow-up list, and will only appear on the next follow-up date

4.C How to Close Lead

After series of follow-up the lead is moved to the final stage that is closure.

You can track the status of lead/enquiry i.e. won, lost or cancelled along with the reason for winning or losing the deal.

Tracking closure details lets you analyze, overall sales performance such as leads/enquiries converted into sales, deals lost to the competitor or cancelled.

Steps to close lead

1. Go to Menu Option **My** → **Closure**
2. Here you will see the list of open leads. Select the lead which you want to Close.
3. Click on **Close Lead** on the above tool bar.
4. **Date** by default would be current date. You can change the date if required.
5. Select **Closure** as Won, Lost or Cancel.
6. Select **Reason** for winning or losing the lead.
7. Enter **Notes**. You can write more details about closure.
8. In **Payment** tab you can enter Payment Details like Payment Type, Bank Name, Cheque No., Amount, Payment Date and Notes.
7. Click on **Save**. You will receive a **Lead Closed Successfully !** message.
8. Click on **OK**.

After lead is closed it will not appear in the Closure screen.

In Reports you can view the closure details.

4.d How to view My Reports

The reports give you the complete overview of sales performance. It gives the complete history of leads, follow-ups and closure details.

All data entered into the system, can be viewed in report, through a smart reporting utility that enables you to sort, filter and aggregate the data.

Lead Report List

List : You will get the list of all the Leads with more details.

Open : You will get the list of open leads which are not yet closed.

Products : You will get the product wise list of Leads.

Followup Report List

List : You will get the list of followups done for the lead.

Pending : You will get the list of pending followups for the lead.

Quotation Report List

List : You will get the list of quotations created

Quotation Products : You will get the list of quotations with products.

Tax : You will get the list of tax added in quotation.

Terms : You will get the list of terms added in quotation.

Closure Report List

List : You will get the list of leads which are closed i.e. won, lost and cancelled

Closure Products : You will get the list of won, lost and cancelled leads with products.

Won List : You will get the list of leads which are won.

Won Products : You will get the list of won leads with products.

Steps to generate Lead reports

1. Go to Menu Option **My** → **Reports** → **Smart Report**
2. In Report List Select **Lead** to view Lead related reports
3. Select **List**

By default current month data will be populated in the right side grid.

To filter data for specific period ,

Select **Date Filter** option on the above toolbar

You can also use **Smart Report** option to Filter, Group and Aggregate the data.

Similarly you can generate other reports.

You can also export the data in Excel by clicking on **Export to Excel**

5

How to assign lead to employees

Lets see how to assign lead to employees.

Lets understand how to manage these stages in detail

5.a How to enter lead

5.b How to assign lead

5.a How to enter Lead

You may receive leads from various sources or activities, for example, digitally via the Internet, through personal referrals, through telephone calls either by the company or telemarketers, through advertisements, and events. Proper Management of lead enables you to easily analyze and track the product, that generate more leads.

Steps to enter lead

1. Go to Menu Option **Organization** → **Leads**
2. **Lead No.** is autogenerated by the system once you save the lead details.
3. **Date** by default would be current date. You can change the date if required.
4. **Time** by default would be current time. You can change the time if required.
5. Enter Customer Name in **Name**.
6. Enter Contact Person name in **Contact Person**.
7. Enter Customer Address in **Address**.
8. Enter Customer Telephone No. in **Telephone No.**
9. Enter Customer Mobile No. in **Mobile No.**
10. Enter Customer E-mail in **E-mail ID**.
11. Enter Customer Website in **Website**.
12. Select **Customer Type** from given list
13. Select **Region** from given list
14. Select **Source** from given list
15. Select **Priority** from given list
16. Select **Stage** from given list
17. Enter name who given reference in **Referred By**.
18. In **Assigned To** List, Select **UNASSIGNED**
19. To add Products in Lead, Click on **Product** tab, present besides the Contacts tab

Steps to add product

- Click on **+** icon.
- Click on **Add**
- Select the **Product**
- Select **Brand**
- Enter **Model**
- Enter the **Quantity**
- Enter the **Rate**
- Click on **OK** to Save the product details

You can follow the above steps to add multiple products

20. Click **Save** on the above Toolbar
21. You will receive the save message "**Lead No.1 Saved !**"
This indicates that your lead is saved successfully.
22. Click **OK**

The new Lead will be listed in the above Leads grid.

Lead number is auto generated for New Lead.

This Lead will appear in the **Assign** screen where you can assign it to the employee.

5.b How to assign Lead

Lets see how to assign the lead to employee

Steps to assign lead

1. Go to Menu Option **Organization** → **Assign**
2. Here you will see the list of leads which are not assigned to employee. Select the lead which you want to assign.
3. Click on **Assign** on above tool bar
3. In **Assigned To** List, Select employee name
4. Click on **Save**. You will receive a **Lead Assigned !** message.
5. Click on **OK**.

After lead is assigned, employee can see that lead with his/her login.

6 User Management

You can create user id and password for Sales Executive to log in.

Salestracker is a multi user application, you can create multiple users with respective login ID and password. A user could be a Sales Executive or Admin,

The admin profile would have full access to entire data in the system, whereas sales executive profile will have limited access to his own data. Hence you can select the user profile accordingly.

Lets understand how to create user and manage existing user

6.a How to create user

6.b How to manage User Id & Password for existing User

6.a How to create user

To create new user login, simply follow the below steps

Steps to create user

1. Go to menu option **Master → Employee (Users)**
2. Enter Employee name in the **Name**
3. Enter Employee Address in the **Address**
4. Enter Employee Telephone No. in **Telephone No.**
5. Enter Employee Mobile No. in the **Mobile No.**
6. Enter Employee Email Id in the **Email Id**
7. Enter Employee joining date in the **Joining Date**
8. To add Login Id and Password, Click on **Login** Tab, present besides the **Details** tab
9. Enter **Login Id**
10. Enter **Password**
11. Select the **Profile** as **Sales Executive**
12. Click **Save** on the above Toolbar
You will receive the save message "**Employee Saved !**"
This indicates that your **Employee** is saved successfully.
13. Click **OK**
The new Employee will be listed in the above Employee grid.

6.b

How to manage user id & Password for existing user

The system automatically creates login ID and password for users / employees entered via wizard. However you can edit these user details.

Let's see how to change the details of these existing users.

Steps to change User Id and Password for existing user

1. Go to menu option **Master → Employee**
2. Select the **Employee Name** in the above grid for e.g. John Smith
3. Click on **Login Tab**, present besides the **Details** tab
4. Change **Login Id**
5. Change the **Password**
6. You can also change the profile if required
7. Click **Save** on the above Toolbar
You will receive the save message "**Employee Saved !**"
This indicates that **User Id** and **Password** is changed successfully.
8. Click **OK**

7

Full access to data with admin user

Data for all employees entered in the system can be viewed from the Organization menu.

The access to this data is available only for the admin users

Lets understand how to view data in screen and reports

7.a How to view data in screen

7.b How to view data in reports

7.a How to view data in screen

To view all leads entered into the system.

Follow the steps given below

Steps to view data in screen

1. Go to menu option **Organization → Leads**

In the above grid you will see leads for all employees.

You can see **Assigned To** column, so that you can view leads employeewise.

2. To view data employee wise, you can click on **Organization Lead** on above tool bar right side (beside close button).
3. Select **Employee** Name from list
4. Click on **OK**.
5. You can see the search result in the above grid.
6. By clicking on grid you can see the details below.

7.b How to view data in reports

To view reports for the entire data entered into the system.

Follow the steps given below.

Steps to generate all employees report

1. Go to Menu Option **Organization** → **Reports** → **Smart Report**
2. In Report List Select **Lead** to view Lead related reports
3. Select **List**
By default current month data will be populated in the right side grid.
To view data for specific employee, Click on **Smart Report** → **Filter** on the above toolbar
5. A filter row will appear in the report grid, below the column headings
6. Select the **Assigned To** from the dropdown in the employee column, the data will get filtered according to the selected criteria

Similarly you can follow the given steps for other reports

Other software's

servicedesk
Service CRM

TimeTracker
Project Timesheet

xplore
Digital catalog software

spinso

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