



# Getting Started

Quick start guide for SalesTracker Basic Edition

## 1

## Index



## Getting Started

1.	<b>Index</b>	.....	pg 2
2.	<b>Introduction to SalesTracker</b>	.....	pg 3
3.	<b>Wizard</b>	.....	pg 4
	3.a	How to enter data in wizard	..... pg 5
4.	<b>Lead Management</b>	.....	pg 7
	4.a	How to enter Lead	..... pg 8
	4.b	How to enter Follow Up	..... pg 9
	4.c	How to close Lead	..... pg 10
	4.d	How to view my reports	..... pg 11
5.	<b>How to assign lead to employees</b>	.....	pg 12
	5. a	How to enter lead	..... pg 13
	5.b	How to assign lead	..... pg 14
6.	<b>User Management</b>	.....	pg 15
	6. a	How to create user	..... pg 16
	6.b	How to manage User Id & Password for existing User	..... pg 17
7.	<b>Full access to data with admin user</b>	.....	pg 18
	7.a	How to view data in screen	..... pg 19
	7.b	How to view data in reports	..... pg 20

# 2

## 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](mailto: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 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

### 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.

#### Sample Data

John Smith

Rita Singh

Click on **Next** button to continue



#### ***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** .

## 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  
Fax



### **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** .

## 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. Enter Customer Name in **Name**.
5. Enter Contact Person name in **Contact Person**.
6. Enter Customer Address in **Address**.
7. Enter Customer Telephone No. in **Telephone no.**
8. Enter Customer E-mail in **E-mail ID**.
9. Select **Source** from given list
10. To add Products in Lead, Click on Product Tab, present besides the Details tab

#### Steps to add product

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

You can follow the above steps to add multiple products

11. Click **Save** on the above Toolbar
12. You will receive the save message "**Lead No.1 Saved !**"  
This indicates that your lead is saved successfully.
13. 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 **Add** on the above tool bar. You can also click on **+** icon to add the followup.
4. **Date** by default would be current date. You can change the date if required.
5. Select the Followup Type from **Type**
6. You can enter **Notes** to write more details about the followup.
7. Enter Date in the Next Follow up details
8. Enter Notes for Next Followup
9. Click on **Save**.
10. You will receive **Followup Saved** message
11. 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 **Status** as Won, Lost or Cancel.
6. Enter **Notes**. You can write more details about closure.
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.

**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.

### Closure Report List

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

**Closure Product** : You will get the list of leads which are closed 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** → **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** → **Custom** option on the above toolbar

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

Similarly you can generate other reports.

# 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. Enter Customer Name in **Name**.
5. Enter Contact Person name in **Contact Person**.
6. Enter Customer Address in **Address**.
7. Enter Customer Telephone No. in **Telephone No.**
8. Enter Customer E-mail in **E-mail ID**.
9. Select **Source** from given list
10. In **Assigned To** List, Select **UNASSIGNED**
11. To add Products in Lead, Click on **Product Tab**, present besides the Details tab

#### Steps to add product

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

You can follow the above steps to add multiple products

12. Click **Save** on the above Toolbar
13. You will receive the save message "**Lead No.1 Saved !**"  
This indicates that your lead is saved successfully.
14. 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. 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 Details** Tab, present besides the **Employee 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 **Assign To** column, so that you can view leads employeewise.

2. To view data employee wise, you can sort the data in the grid in ascending or descending order, by clicking on the **Assign To** column heading (optional)
3. Select the lead from the grid, the respective details will be displayed 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** → **Report**
2. In Report List Select **Lead** to view Lead related reports
3. Select **List**  
By default all the leads will be shown on the right hand side grid
4. 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 employee name 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**

**Spinso**

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