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Lite Edition

salestracker

Free Sales CRM

free

Getting Started

Quick start guide for Sales Tracker Lite Edition

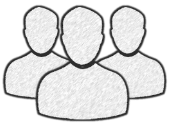
1 Index

Getting Started

2 Introduction to SalesTracker Lite

SalesTracker Lite is simple ready to use free CRM software, to manage your business enquiry's/leads in 3 easy steps Lead, Follow up & Closure.

SalesTracker Lite has been designed keeping in mind, the need of small business, to help them organize sales process and accelerate growth.



It is a single pc, multi-user application which supports up to 3 users.
Ideal for individual and small business.
No registration required simply download, install and start using SalesTracker Lite.
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 Lite.

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 and Product 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.

In SalesTracker Lite you get 3 user free license, Admin user is the default user created by the system, hence now you can add up to 2 more Employee/Users.

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** .

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.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. 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
10. Click **Save** on the above Toolbar
11. You will receive the save message "**Lead No.1 Saved !**"

    This indicates that your lead is saved successfully.
12. Click **OK**
13. 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 Lite 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**
2. You will see the list of leads which are pending for followups. 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. You can enter **Notes** to write more details about the followup.
6. Enter **Date** in the Next Follow up details
7. Enter **Notes** for Next Followup
8. Click on **Save**.
9. You will receive **Followup Saved** message
10. 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.

5 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

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

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.

6 User Management

Salestracker lite 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 Email Id in the **Email Id**
6. To add Login Id and Password, Click on **Login** Tab, present besides the **Details** tab
7. Enter **Login Id**
8. Enter **Password**
9. Select the **Profile** as **Sales Executive**
10. Click **Save** on the above Toolbar
    You will receive the save message "**Employee Saved !**"
    This indicates that your **Employee** is saved successfully.
11. 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.
2. To view data employee wise, you can sort the data in the grid in ascending or descending order, by clicking on the employee 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

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Road No.9, Wagle Estate,
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