

stⁱ

salestracker Basic
sales CRM



1

Index



Getting Started

1.	Index	.....	pg 2
2.	Introduction to SalesTracker	.....	pg 3
3.	Wizard	.....	pg 4
	3.a	How to enter data in wizard	..... pg 5
4.	Lead Management	.....	pg 7
	4.a	Entering your first Lead	..... pg 8
	4.b	Entering your first Follow Up	..... pg 11
	4.c	How to close Lead	..... pg 13
5.	Reports	.....	pg 15
	5.a	Introduction of Reports	..... pg 16
		5.a.1 Date Filter	..... pg 18
		5.a.1.a All	..... Pg 18
		5.a.1.b Custom	..... Pg 19
		5.a.2 Smart Report	..... pg 20
		5.a.2.a Filter	..... Pg 20
		5.a.2.b Aggregate	..... Pg 22
	5.b	My Reports	..... pg 24
	5.c	Organization Reports	..... pg 26

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

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

It covers 3 important stages i.e.

- Lead
- Follow Up
- Closure

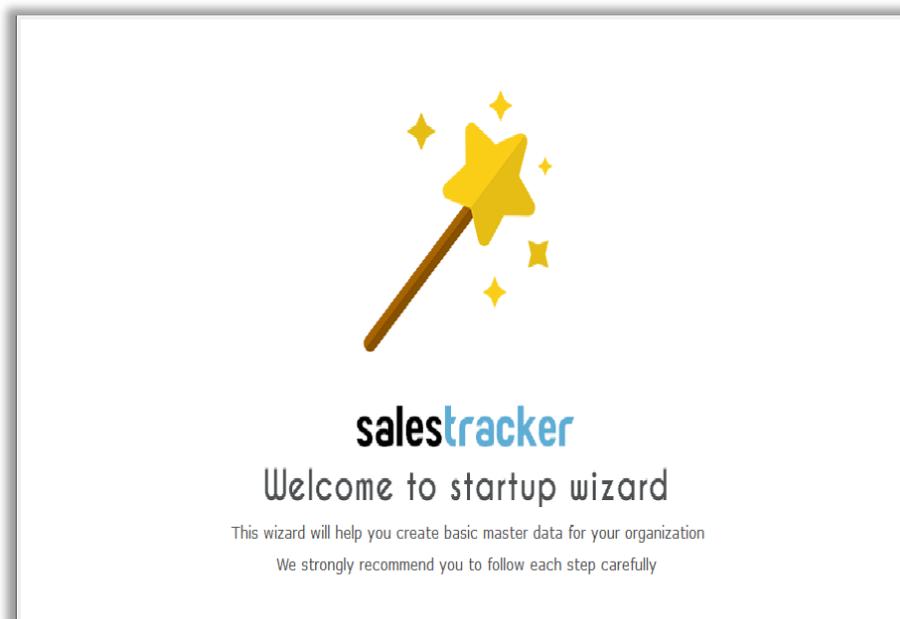
3 Wizard

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.

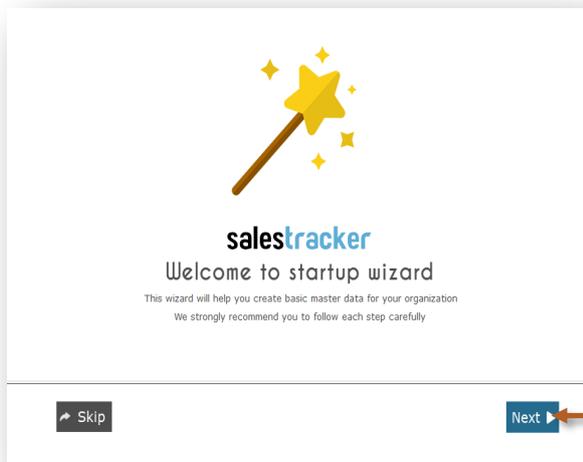


3.a

How to enter data in Wizard

**Please note**

If you wish to skip this, you can also enter data via respective master 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

In employee wizard you can enter Employee/User names.

Sample Data

John Smith
Rita Singh

Click on **Next** button to continue

**Please note**

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

In Product wizard you can enter your product categories for lead.

Each product should be added in a new line.

Sample Data

Computer
CCTV
Air conditioner
Mobile

Click on **Next** button to continue

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

Sample Data

Phone
Mail
Personal visit
Fax

Click on **Next** button to continue

This is the final screen in wizard.

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

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



Please note

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

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

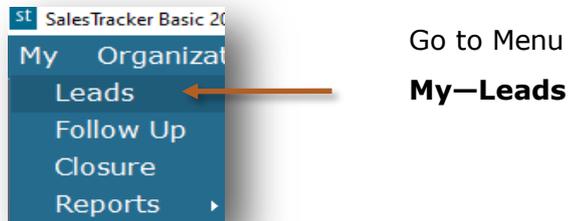
4.a Entering your first Lead

4.b Entering your first Followup

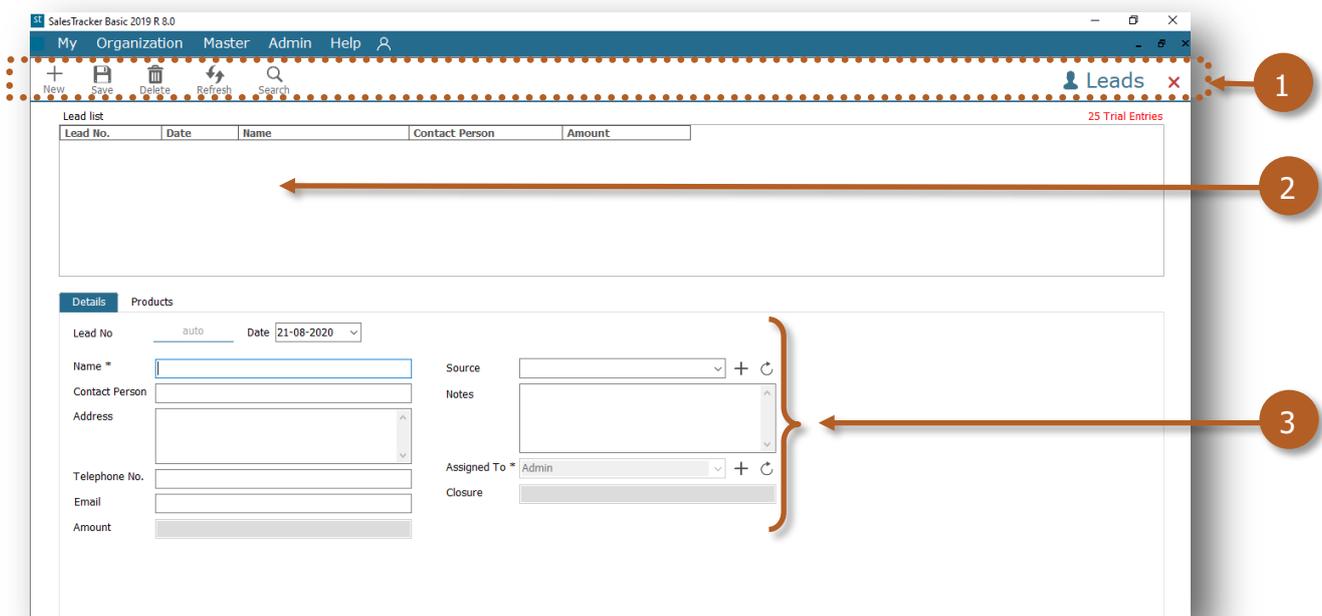
4.c How to Close lead

4.a Entering your first Lead

Lets see How to enter your first Lead



Lead screen can be broadly divided into 3 sections that is explained below



1. Toolbar to add, delete or Search data
2. List of Leads to view the details
3. Leads update section to add or modify the details



Please note

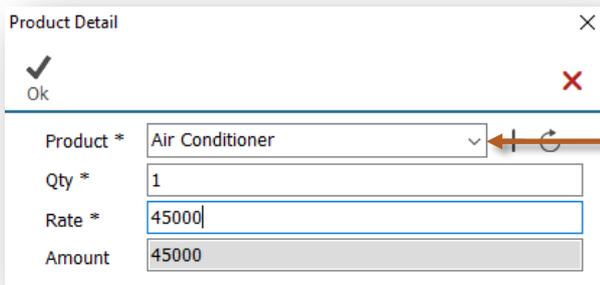
Lead No. is auto generated, a unique number would be generated once you save it.

Enter details such as
 Name
 Contact person
 Address
 Telephone No.
 Email
 Notes
 Select Source

Click on **Products** to add the Product for the Lead

Click on **+** to add the Product for the Lead

Click on **Add** to add the Product for the Lead



Product Detail

Ok

Product * Air Conditioner

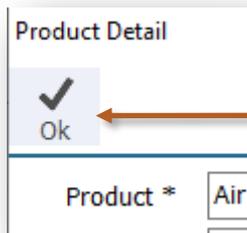
Qty * 1

Rate * 45000

Amount 45000

Select **Product** from the list.

You can also change Quantity and Rate if required.

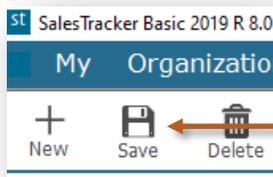


Product Detail

Ok

Product * Air

Click on **OK** to save the product for Lead

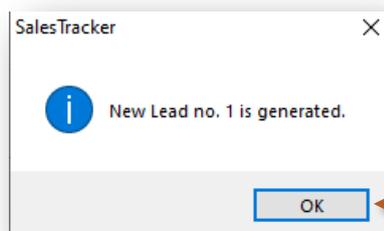


st SalesTracker Basic 2019 R 8.0

My Organization

New Save Delete

Click on **Save** on top toolbar to save the Lead



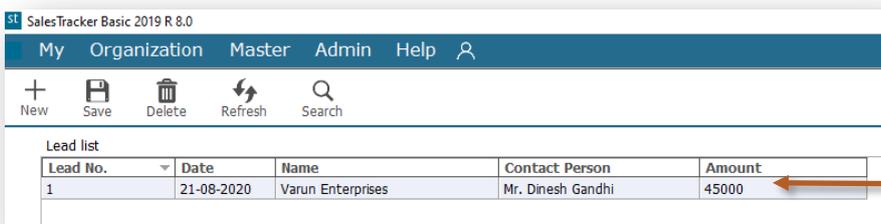
SalesTracker

New Lead no. 1 is generated.

OK

This indicates that your Lead is saved

Click on **OK**



st SalesTracker Basic 2019 R 8.0

My Organization Master Admin Help

New Save Delete Refresh Search

Lead list

Lead No.	Date	Name	Contact Person	Amount
1	21-08-2020	Varun Enterprises	Mr. Dinesh Gandhi	45000

You can see saved Lead in the grid view.

You can click on it to view the details below.



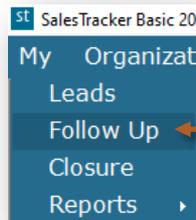
Please note

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

4.b Entering your first 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.

Lets see how to enter your first follow up.

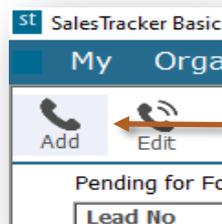


Go to Menu
My—Follow Up

Lead No	Date	Name	Contact Person	Amount	Next Followup Date	Next Followup Notes
1	21-08-2020	Varun Enterprises	Mr. Dinesh Gandhi	45000		

You will see the Lead in the grid view which is pending for followup

Select the Lead to enter the followup



Click on Add on top tool bar to enter the follow up

Followup Details: Varun Enterprises

Save

Follow Up Details

Date: 27-08-2020

Type: Phone

Notes: customer is busy

Next Follow Up Details

Date: 28-08-2020

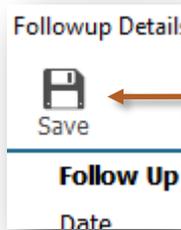
Notes: ask him if he checked the mail

You can select Follow up Type

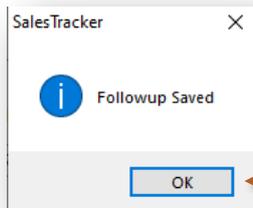
You can enter more details about follow up

You can select Next Follow up Date

You can enter more details about Next Followup

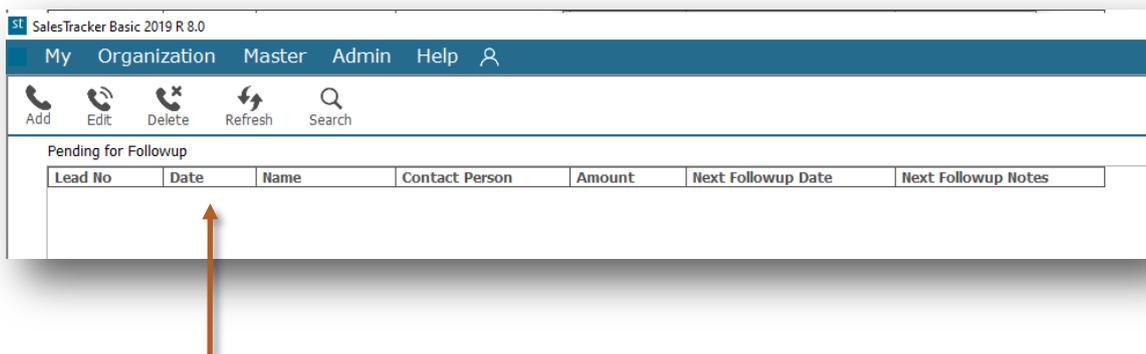


Click on **Save** to save the follow up



This indicates that your Follow up is saved

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.

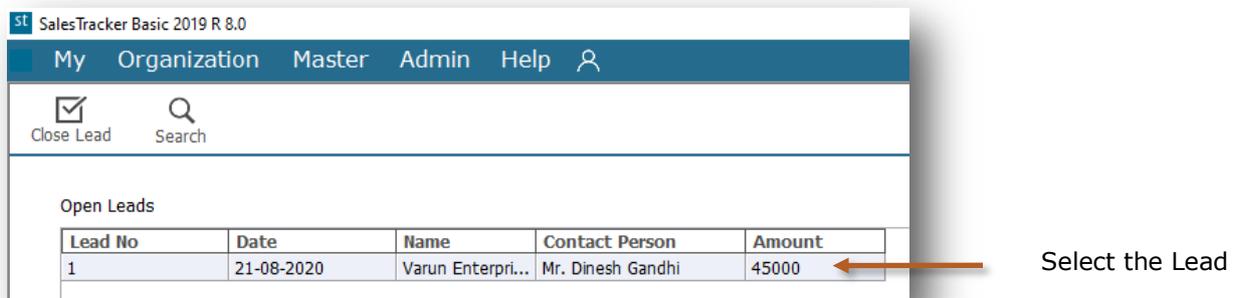
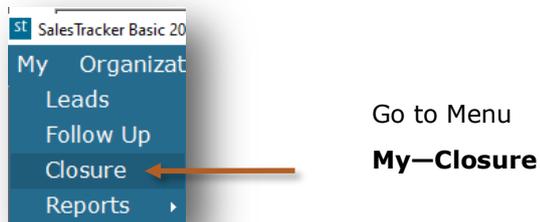
4.C How to Close Lead

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

You can close the lead by selecting following status, along with the more information for winning or losing the deal.

- **Won**
- **Lost**
- **Cancelled**

Lets see How to close Lead



Close Lead : Varun Enterprises

Date: 24-08-2020

Closure * : Won

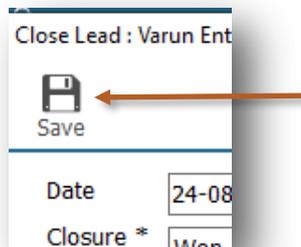
Notes: given 20% discount

Product Name	Qty	Rate	Amount
Air Conditioner	1	45000	45000

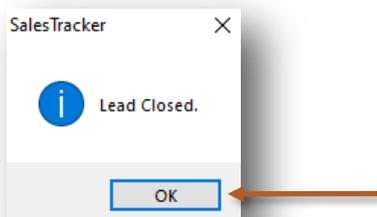
Total Amount: 45000

Select the closure from the list as Won, Lost or Cancelled

You can enter more information about closure in the Notes



Click on **Save** button to save the details



This indicates that your Lead is closed

Click on **OK**

SalesTracker Basic 2019 R 8.0

My Organization Master Admin Help

Close Lead Search

Open Leads

Lead No	Date	Name	Contact Person	Amount
---------	------	------	----------------	--------

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

In Reports you can view the closure details.

5

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, aggregate and export the data to excel.

Reports are described in following 3 steps

5.a Introduction of Reports

5.a.1 Date Filter

5.a.2 Smart Report

5.b My— Reports (*In this sales executive can see only his data in the reports*)

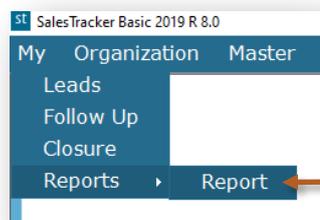
5.c Organization— Reports (*In this admin can see all sales executives data in the reports*)

5.a

Introduction of Reports

In Reports you can see filter, sort and aggregate the data for more details.

Lets see how to see Reports



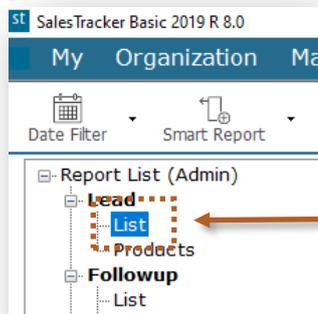
Go to Menu

My—Reports—Report

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup Date	Next Followup
1	01-09-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@vanan...	Exhibition	35000	15-07-2020	
2	03-09-2020	Milleshup Zesox	Mr. Navin	112, Gunkrup	9823568956	navin5478@ga...	Existing Custo...	50000	15-02-2020	
3	04-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@...	Paper Advertis...	40000	18-07-2020	
4	05-09-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakul...	Seminar	50000	17-07-2020	
5	08-09-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	Walk in	75000	12-07-2020	
6	10-09-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@e...	Website	35000		
7	12-09-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	Exhibition	12000	18-07-2020	
8	13-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@...	Existing Custo...	15000	18-07-2020	
9	14-09-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yahoo...	Paper Advertis...	20000		
10	14-09-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	Seminar	70000	18-07-2020	
14	18-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@...	Walk in	35000		

1. Toolbar to filter datewise and smart reporting options
2. Report List
3. Data viewer grid

Lets see how to view report for **Lead—List** where you will get the list of leads which are entered.



Click on **List**

By default current month data will be populated

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup Date	Next Followup
1	01-09-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	Exhibition	35000	15-07-2020	
2	03-09-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	Existing Custo...	50000	15-07-2020	
3	04-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Paper Advertis...	40000	18-07-2020	
4	05-09-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	Seminar	50000	17-07-2020	
5	08-09-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	Walk in	75000	12-07-2020	
6	10-09-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@re...	Website	35000		
7	12-09-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	Exhibition	12000	18-07-2020	
8	13-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Existing Custo...	15000	18-07-2020	
9	14-09-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yaho...	Paper Advertis...	26000		
10	14-09-2020	A to Z Consult...	Tulip Dsouza	Girija Compu...	9820102030	tulip.dsouza@...	Seminar	70000	18-07-2020	
14	18-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Walk in	35000		

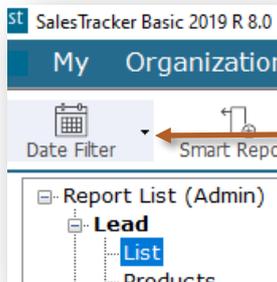
Data is showing in the data viewer grids

Now we will see how to use Date Filter, Smart Report and Export to Excel from top tool bar.

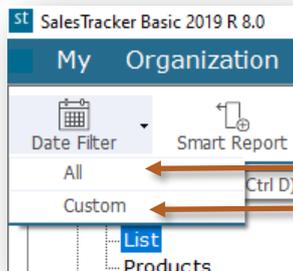
5.a.1 Date Filter

In Date Filter we can filter the data for specific period or also we can see all data.

Lets see how to use **Date Filter**



Click on **Date Filter**



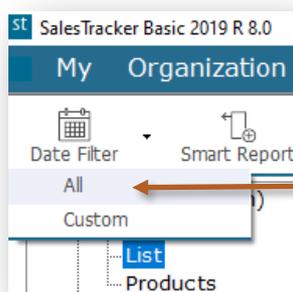
In Date Filter there are 2 options

5.a.1.a **All** (You can see all data)

5.a.1.b **Custom** (You can see data for specific period)

5.a.1.a All

Now we will see how to view all data by using **All** option



Click on **All**

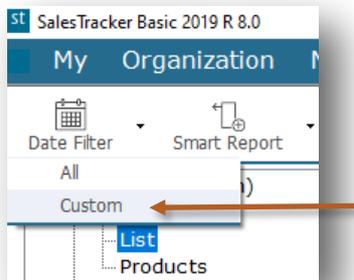
You can see All Leads

 A screenshot of the SalesTracker Basic 2019 R 8.0 interface showing the 'Lead List' table. The table has columns for Lead No, Lead Date, Name, Contact Person, Address, Telephone, Email, Source, Amount, and Next Followup Date. An orange arrow points to the 'All Leads' button in the top right corner of the table area.

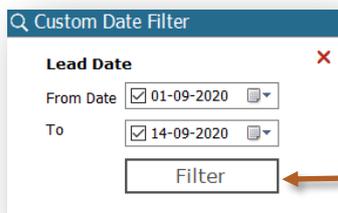
Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup Date
1	01-09-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	Exhibition	35000	15-07-2020
2	03-09-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	Existing Custo...	50000	15-07-2020
3	04-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Paper Advertis...	40000	18-07-2020
4	05-09-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	Seminar	50000	17-07-2020
5	08-09-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	Walk in	75000	12-07-2020
6	10-09-2020	Matihli Bangera		605, Everest A...	8775698569	matihli58@re...	Website	35000	
7	12-09-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	Exhibition	12000	18-07-2020
8	13-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Existing Custo...	15000	18-07-2020
9	14-09-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yahoo...	Paper Advertis...	26000	
10	14-09-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	Seminar	70000	18-07-2020
14	18-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Walk in	35000	

5.a.1.b Custom

Now we will see how to view data for particular period by using **Custom** option



Click on **Custom**



Select the period in **From Date** and **To** then click on **Filter**

Data is filtered for **01-09-2020** to **14-09-2020**

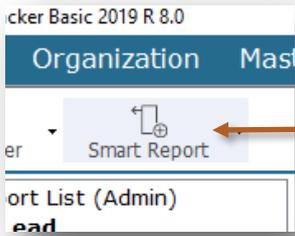
Lead No.	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Value	Created Date
1	01-09-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	Exhibition	35000	15-07-2020
2	03-09-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	Existing Custo...	50000	15-07-2020
3	04-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Paper Advertis...	40000	18-07-2020
4	05-09-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	Seminar	50000	17-07-2020
5	08-09-2020	Nitin Verma		201, Siddhi Av...	98211548798	nitin547@gma...	Walk in	75000	12-07-2020
6	10-09-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@re...	Website	35000	
7	12-09-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	Exhibition	12000	18-07-2020
8	13-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Existing Custo...	15000	18-07-2020
9	14-09-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yaho...	Paper Advertis...	26000	
10	14-09-2020	A to Z Consult...	Tulip Dsouza	Ginja Compou...	9820102030	tulip.dsouza@...	Seminar	70000	18-07-2020

5.a.2

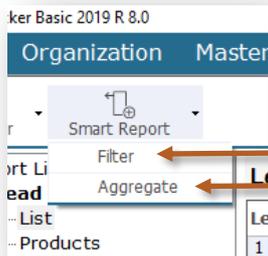
Smart Report

In Smart Report we can Filter and Aggregate the data.

Lets see how to use **Smart Report**



Click on **Smart Report**



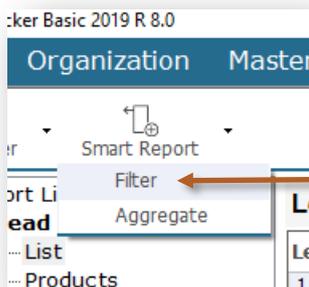
In Smart Report there are 2 options

5.a.2.a **Filter** (You can Filter the data with any column)

5.a.2.b **Aggregate** (You can take count, average or sum for data)

5.a.2.a Filter

Now we will see how to filter data by using **Filter** option



Click on **Filter**

Filter option added

Lead List Lead date for the period 01-09-2020 To 30-09-2020

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup Da
1	01-09-2020	Ashok Enterprises	Mr. Ashok Shah	Lalwani Compound,	26936985	ashok@varun...	Exhibition	35000	15-07-2020
2	03-09-2020	Millenium Zerox	Mr. Navin	112, Gurukrupa Avenue,	9823568956	navin5478@ya...	Existing Cust...	50000	15-07-2020
3	04-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	40000	18-07-2020
4	05-09-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium IT Park,	27886652	bakul@bakule...	Seminar	50000	17-07-2020
5	08-09-2020	Nitin Verma		201, Siddhi Avenue,	9821548798	nitin547@gma...	Walk in	75000	12-07-2020
6	10-09-2020	Maithili Bangera		605, Everest Apartment,	8775698569	maithili58@re...	Website	35000	
7	12-09-2020	Vanraj Trading company	Mr. Manohar Das	114, New Era Shopping C...	26938574	Manohar3636...	Exhibition	12000	18-07-2020
8	13-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	15000	18-07-2020
9	14-09-2020	Dilip Zaveri		112, Piramal Industrial Es...	9920415241	dilip96@yahoo...	Paper Advertis...	26000	
10	14-09-2020	A to Z Consultants	Tulip Dsouza	Girija Compound,	9820102030	tulip.dsouza@...	Seminar	70000	18-07-2020
14	18-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	35000	

Select data from drop down list

Lead List Lead date for the period 01-09-2020 To 30-09-2020

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup Da
1	01-09-2020	Ashok Enterprises	Mr. Ashok Shah	Lalwani Compound,	26936985	ashok@varun...	Exhibition	35000	15-07-2020
2	03-09-2020	Millenium Zerox	Mr. Navin	112, Gurukrupa Avenue,	9823568956	navin5478@ya...	Existing Cust...	50000	15-07-2020
3	04-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	40000	18-07-2020
4	05-09-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium IT Park,	27886652	bakul@bakule...	Seminar	50000	17-07-2020
5	08-09-2020	Nitin Verma		201, Siddhi Avenue,	9821548798	nitin547@gma...	Walk in	75000	12-07-2020
6	10-09-2020	Maithili Bangera		605, Everest Apartment,	8775698569	maithili58@re...	Website	35000	
7	12-09-2020	Vanraj Trading company	Mr. Manohar Das	114, New Era Shopping C...	26938574	Manohar3636...	Exhibition	12000	18-07-2020
8	13-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	15000	18-07-2020
9	14-09-2020	Dilip Zaveri		112, Piramal Industrial Es...	9920415241	dilip96@yahoo...	Paper Advertis...	26000	
10	14-09-2020	A to Z Consultants	Tulip Dsouza	Girija Compound,	9820102030	tulip.dsouza@...	Seminar	70000	18-07-2020
14	18-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	35000	

Data is filtered for Exhibition

Lead List Lead date for the period 01-09-2020 To 30-09-2020

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup Da
1	01-09-2020	Ashok Enterprises	Mr. Ashok Shah	Lalwani Compound,	26936985	ashok@varun...	Exhibition	35000	15-07-2020
3	04-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	40000	18-07-2020
7	12-09-2020	Vanraj Trading company	Mr. Manohar Das	114, New Era Shopping C...	26938574	Manohar3636...	Exhibition	12000	18-07-2020
8	13-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	15000	18-07-2020
14	18-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	35000	

As you can see we filtered data for Exhibition. Lets see how to use multi filter with more column.

You can select multi filter for Name

Lead List Lead date for the period 01-09-2020 To 30-09-2020

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup
1	01-09-2020	Ashok Enterprises	Mr. Ashok Shah	Lalwani Compound,	26936985	ashok@varun...	Exhibition	35000	15-07-2020
3	04-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	40000	18-07-2020
7	12-09-2020	Vanraj Trading company	Mr. Manohar Das	114, New Era Shopping C...	26938574	Manohar3636...	Exhibition	12000	18-07-2020
8	13-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	15000	18-07-2020
14	18-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	35000	

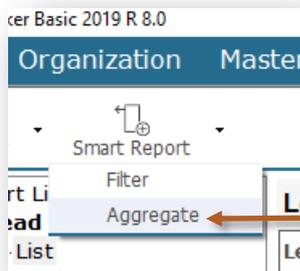
As you can see we have filtered Exhibition data for Disha Enterprises

Lead List Lead date for the period 01-09-2020 To 30-09-2020

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup
3	04-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	40000	18-07-2020
8	13-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	15000	18-07-2020
14	18-09-2020	Disha Enterprises	Mr. Vinit Kumar	Nil Kamal Estate,	278459874	vinit.kumar@g...	Exhibition	35000	

5.a.2.b Aggregate

Lets see how to use Smart Report to **Aggregate** the data



Click on **Aggregate**

Formula option added

Lead List Lead date for the period 01-09-2020 To 30-09-2020

Lead No	Lead Date	Σ Name	Σ Contact Person	Σ Address	Σ Telephone	Σ Email	Σ Source	Σ Amount	Σ Next Followup Date	Σ Ne
1	01-09-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	Exhibition	35000	15-07-2020	
2	03-09-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	Existing Custo...	50000	15-07-2020	
3	04-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	40000	18-07-2020	
4	05-09-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	Seminar	50000	17-07-2020	
5	08-09-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@oma...	Walk in	75000	12-07-2020	

Click on **Formula icon** and select **Sum**

Lead List Lead date for the period 01-09-2020 To 30-09-2020

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup Date	Ne
1	01-09-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	Exhibition	35000	15-07-2020	
2	03-09-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	Existing Custo...	50000	15-07-2020	
3	04-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	40000	18-07-2020	
4	05-09-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	Seminar	50000	17-07-2020	
5	08-09-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	Walk in	75000	12-07-2020	
6	10-09-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@re...	Website	35000		
7	12-09-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	Exhibition	12000	18-07-2020	
8	13-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	15000	18-07-2020	
9	14-09-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yaho...	Paper Advertis...	26000		
10	14-09-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	Seminar	70000	18-07-2020	
14	18-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	35000		

Select Summaries

Average

Count

Maximum

Minimum

Sum

OK Cancel

Lead List Lead date for the period 01-09-2020 To 30-09-2020

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup Date	Ne
1	01-09-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	Exhibition	35000	15-07-2020	
2	03-09-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	Existing Custo...	50000	15-07-2020	
3	04-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	40000	18-07-2020	
4	05-09-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	Seminar	50000	17-07-2020	
5	08-09-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	Walk in	75000	12-07-2020	
6	10-09-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@re...	Website	35000		
7	12-09-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	Exhibition	12000	18-07-2020	
8	13-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	15000	18-07-2020	
9	14-09-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yaho...	Paper Advertis...	26000		
10	14-09-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	Seminar	70000	18-07-2020	
14	18-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	35000		
Grand Summaries								Sum = 443000		

Summary of Amount

5.b My—Reports

In My—Reports sales executive can see his data in the reports. He can filter, sort and aggregate the data for more details.

Lets see how to see My-Reports

Go to Menu
My—Reports—Report

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Source	Amount	Next Followup Date	Next Follow
1	01-09-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varan...	Exhibition	35000	15-07-2020	
2	02-09-2020	Millenium Zerox	Mr. Navin	112, Gunokrup...	9823568956	navin5478@ya...	Existing Custo...	50000	15-07-2020	
3	04-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	40000	18-07-2020	
4	05-09-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakul...	Seminar	50000	17-07-2020	
5	08-09-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	Walk in	75000	12-07-2020	
6	10-09-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@re...	Website	35000		
7	12-09-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	Exhibition	12000	18-07-2020	
8	13-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	15000	18-07-2020	
9	14-09-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yahoo...	Paper Advertis...	26000		
10	14-09-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	Seminar	70000	18-07-2020	
14	18-09-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	35000		

This is report list and now we will see more details about report list

My-Reports List

Lead

1 List

You will get the list of Leads with following fields.

Lead No, Lead Date, Name, Contact Person, Address, Telephone, Email, Source, Amount, Next Followup Date, Next Followup Notes, Closure & Lead Notes

2 Products

You will get the product wise list of Leads with following fields.

Lead No, Date, Name, Product Name, Rate, Qty, Amount, Source, Contact Person, Address & Telephone

Followup

3 List

You will get the list of followups with following fields.

Lead No, Name, Address, Telephone, Followup Date, Followup Type, Followup Notes, Next Followup Date & Next Followup Notes

4 Pending

You will get the list of pending followups with following fields.

Lead No, Lead Date, Name, Contact Person, Address, Telephone, Email, Source, Amount, Next Followup Date, Next Followup Notes & Lead Notes

Closure

5 List

You will get the list of leads which are closed that is Won, Lost or Cancelled with following fields.

Lead No, Lead Date, Name, Closure, Closure Date, Closure Notes, Amount & Won Amount

6 Products (Leads)

You will get the list of product wise won leads with following fields.

Lead No, Name, Contact Person, Address, Telephone, Email, Product Name, Rate, Qty, Amount, Closure Date, Source & Closure

Won

7 List

You will get the list of leads which are Won with following fields.

Lead No, Lead Date, Name, Won Date, Won Notes, Amount & Won Amount

8 Products

You will get the list of product wise won leads with following fields.

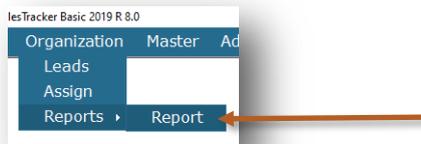
Lead No, Name, Product Name, Rate, Qty, Amount & Won Date

5.c

Organization—Reports

In Organization—Reports admin can see masters and all sales executive's data in the reports. He can filter, sort, aggregate and export the data to excel for more details.

Lets see how to see Organization-Reports



Go to Menu

Organization—Reports—Report

You will get the data Sales Executive wise

Report List (All Employees)									
Lead List									
Lead date for the period 01-09-2020 To 30-09-2020									
Address	Telephone	Email	Source	Amount	Next Followup Date	Next Followup Notes	Closure	Notes	Assigned To
Lalwani Comp...	26936985	ashok@varun...	Exhibition	35000	15-07-2020			call urgent	Admin
112, Gurukrup...	9823568956	navin5478@ya...	Existing Cust...	50000	15-07-2020				Admin
Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	40000	18-07-2020		Won	required Del...	Admin
256, Millenium...	27886652	bakul@bakul...	Seminar	50000	17-07-2020			want Aircond...	Admin
201, Siddhi Av...	9821548798	nitin547@gma...	Walk in	75000	12-07-2020		Won	call and visit	Admin
605, Everest A...	8775698569	maithil58@re...	Website	35000				500 SQ Ft are...	Admin
114, New Era...	26938574	Manohar3636...	Exhibition	12000	18-07-2020		Lost		Admin
Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	15000	18-07-2020		Won	quote given	Admin
112, Piramal I...	9920415241	dilip96@yaho...	Paper Advertis...	26000				given quote f...	Admin
Girja Compou...	9820102030	tulip.dsouza@...	Seminar	70000	18-07-2020		Won	given quote f...	Admin
Sunder lal Co...	26869685	rubina.shakh...		25000	18-07-2020		Won		Yogesh Shah
Vashi Branch	2784512/2785...	kumar@hdfc.c...		75000	20-07-2020		Lost		Yogesh Shah
201 Rizvi Apar...	258635212	durgesh54@g...		25000	19-07-2020		Won	quote given fr...	Yogesh Shah
Nil Kamal Esta...	278459874	vinit.kumar@g...	Exhibition	35000			Won		Admin

This is report list and now we will see more details about report list

Organization-Reports List

Masters

- 1 Employee (Users)**
 You will get the list of all the Employees with following fields.
 Name, Address, Telephone, Mobile, Email, Joining Date, Leaving Date, Login Name, Profile & Notes
- 2 Product**
 You will get the list of all the Products with following fields.
 Name, code, Description & Price
- 3 Parameter**
 You will get the list of all the Parameters with following fields.
 Type & Name

Lead

- 4 List**
 You will get the list of Leads for all the Sales Executives with following fields.
 Lead No, Lead Date, Name, Contact Person, Address, Telephone, Email, Source, Amount, Next Followup Date, Next Followup Notes, Closure, Notes & Assigned To
- 5 Products**
 You will get the product wise list of Leads for all the Sales Executives with following fields.
 Lead No, Date, Name, Product Name, Product Code, Description, Rate, Qty, Amount, Source, Contact Person, Address, Telephone & Assigned To
- 6 Unassigned**
 You will get the list of Leads which are not assigned with following fields.
 Lead No, Lead Date, Name, Contact Person, Address, Telephone, Email, Source, Amount & Notes

Followup

- 7 List**
 You will get the list of followups for all the Sales Executives with following fields.
 Lead No, Name, Address, Telephone, Email, Followup Date, Followup Type, Followup Notes, Next Followup Date, Next Followup Notes & Assigned To
- 8 Pending**
 You will get the list of pending followups for all the Sales Executives with following fields.
 Lead No, Lead Date, Name, Contact Person, Address, Telephone, Email, Source, Amount, Next Followup Date, Next Followup Notes, Notes & Assigned To

Closure

9

List

You will get the list of leads which are closed that is Won, Lost or Cancelled with following fields.

Lead No, Lead Date, Name, Closure, Closure Date, Closure Notes, Assigned To, Amount & Won Amount

10

Products (Leads)

You will get the list of product wise closure leads with following fields.

Lead No, Name, Contact Person, Address, Telephone, Email, Product Name, Rate, Qty, Amount, Closure Date, Source & Closure

Won

11

List

You will get the list of leads which are Won with following fields.

Lead No, Lead Date, Name, Won Date, Won Notes, Amount, Won Amount & Assigned To

12

Products

You will get the list of product wise won leads with following fields.

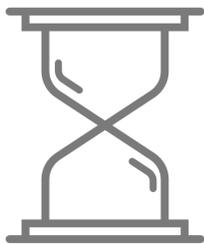
Lead No, Name, Product Name, Rate, Qty, Amount, Won Date & Assigned To

SPINSO^o

more products



ServiceDesk
service CRM



TimeTracker
timesheet

SPINSO.com