

stⁱ

salestracker^{Lite}
free sales CRM



1

Index



Getting Started

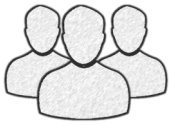
1.	Index	pg 2
2.	Introduction to SalesTracker	pg 3
3.	Wizard	pg 4
3.a	How to enter data in wizard	pg 5
4.	Lead Management	pg 7
4.a	Entering your first Lead	pg 8
4.b	Entering your first Follow Up	pg 11
4.c	How to close Lead	pg 13
5.	Reports	pg 15
5.a	Introduction of Reports	pg 16
5.a.1	Date Filter	pg 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 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.

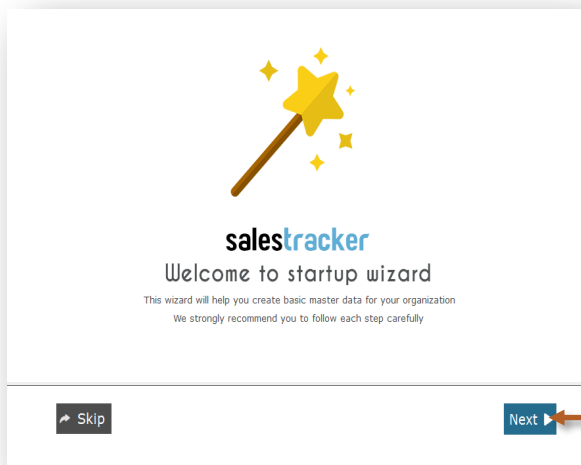


3.a

How to enter data in Wizard

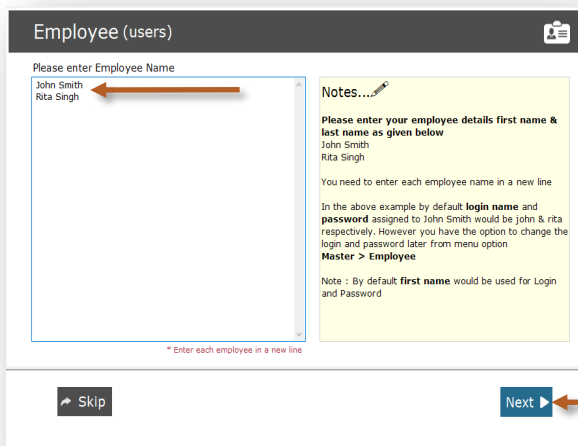
**Please note**

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.

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.

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

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

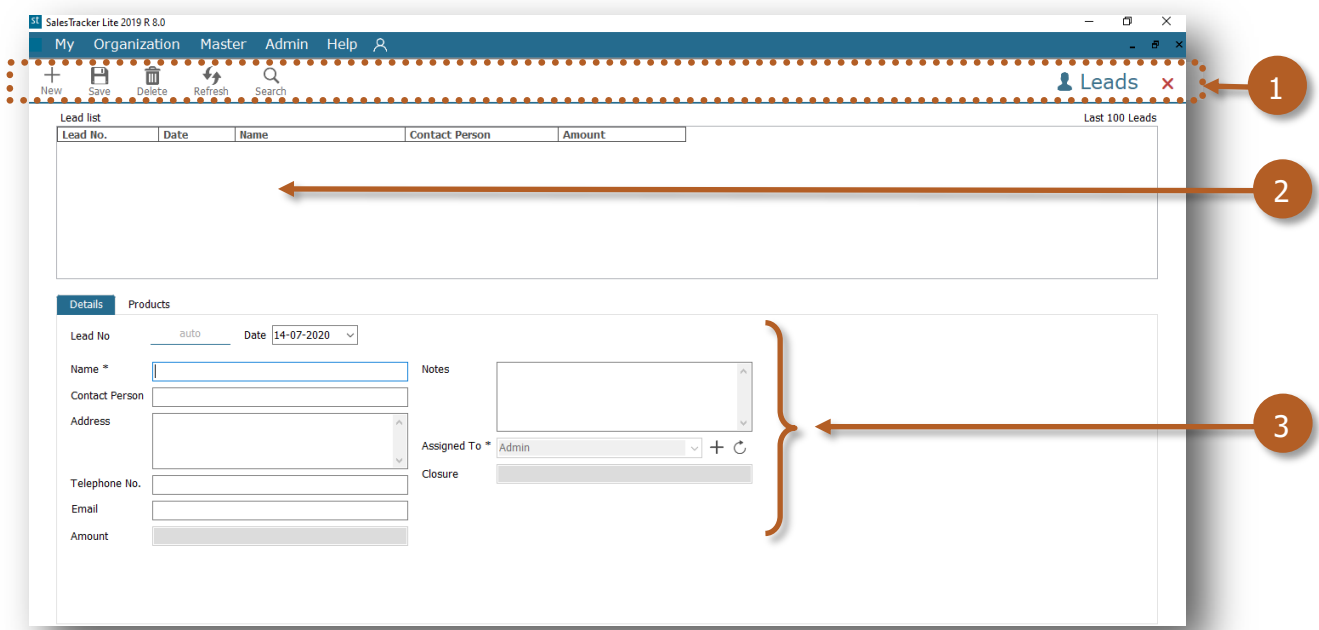
4.c How to Close lead

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

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 *

Qty *

Rate *

Amount

Select **Product** from the list.
You can also change Quantity and Rate if required.

Product *

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

New Save Delete

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

OK

This indicates that your Lead is saved

Click on **OK**

Lead No.	Date	Name	Contact Person	Amount
1	14-07-2020	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.



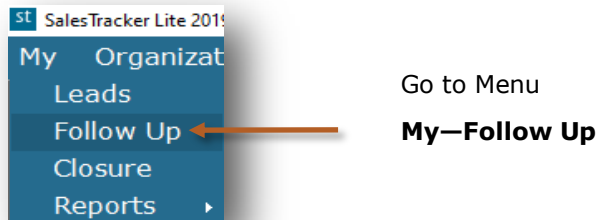
Please note

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

4.b Entering your first Follow Up

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

Lets see how to enter your first follow up.

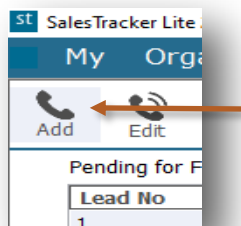


Go to Menu
My-Follow Up

Lead No	Date	Name	Contact Person	Amount	Next Followup Date
1	14-07-2020	Varun Enterprises	Mr. Dinesh Gandhi	45000	

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

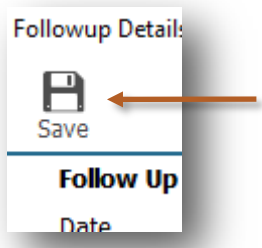
Select the Lead to enter the followup



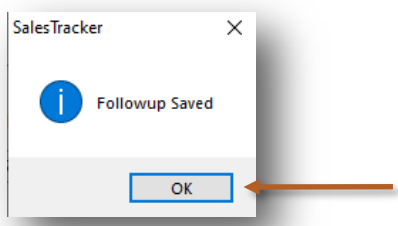
Click on Add on top tool bar to enter the follow up

You can enter more details about follow up

You can select Next Follow up Date on which you want to do the follow up

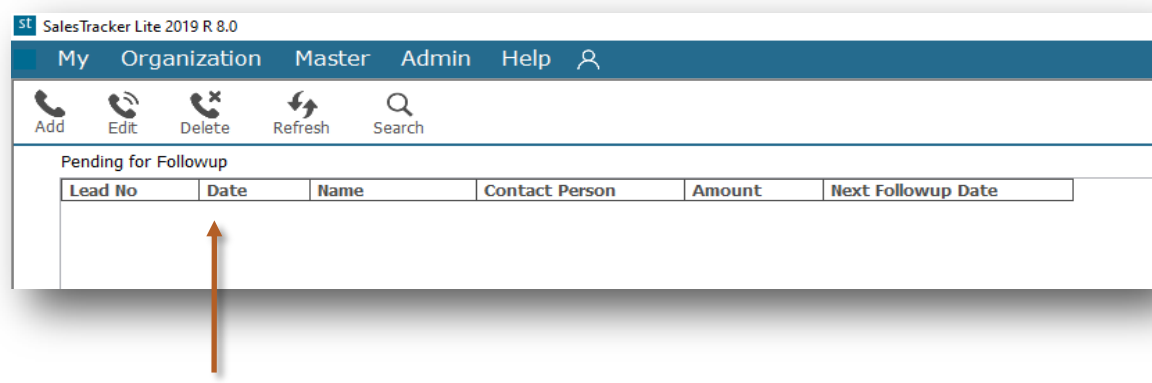


Click on **Save** to save the follow up



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

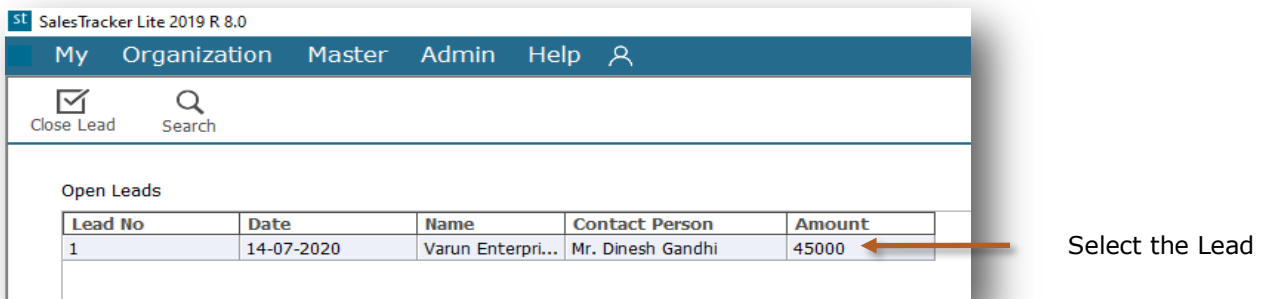
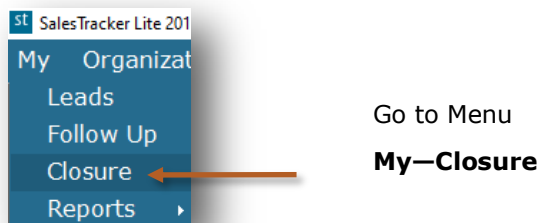
4.C How to Close Lead

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



Product Name	Qty	Rate	Amount
Air Conditioner	1	45000	45000

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

You can enter more information about closure in the Notes

Save

Date 16-07-20

Closure * Won

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

Lead Closed.

OK

This indicates that your Lead is closed

Click on **OK**

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 and aggregate the data.

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*)

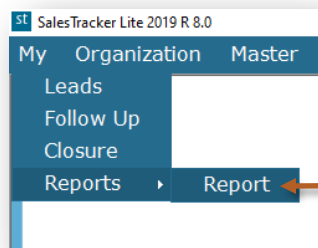
5.c Organization— Reports (*In this admin can see all sales executives data in the reports*)

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



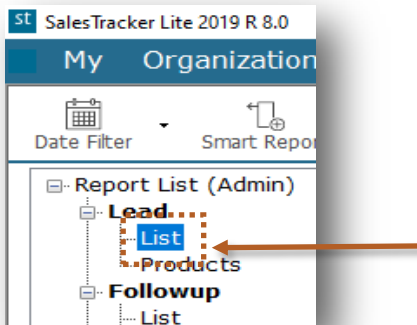
Go to Menu

My—Reports—Report

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Lead Notes
1	01-07-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	35000		call urgent
2	03-07-2020	Millenium Zerpx	Mr. Navin	112, Gunkrup...	9823568956	navin5478@ya...	50000		
3	04-07-2020	Mr. Vinay Kum...		502, Manik Ap...	9821065478	vinaykumar55...	40000		required Dell L...
4	05-07-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakul...	50000		want Aircondit...
5	08-07-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	75000	Won	call and visit
6	10-07-2020	Maitihli Bangera		605, Everest A...	8775698569	maithili58@re...	35000		500 SQ Ft area
7	12-07-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	12000	Lost	
8	13-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@...	15000	Won	quote given
9	15-07-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yahoo...	20000		given quote fo...
10	16-07-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	70000	Won	given quote fo...

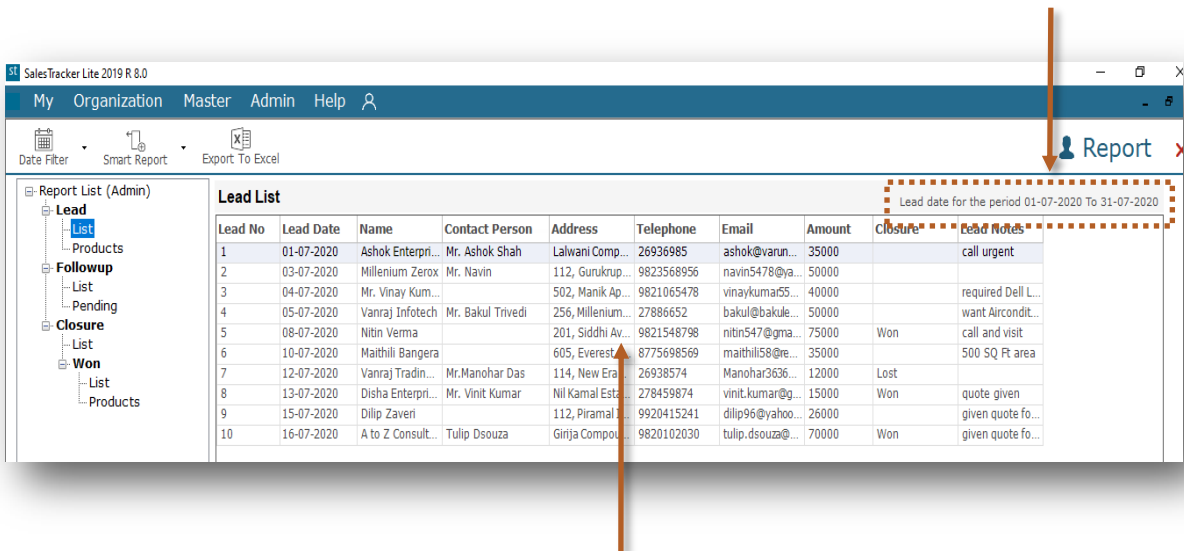
1. Toolbar to filter datewise and smart reporting options
2. Report List
3. Data viewer grid

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



Data is showing in the data viewer grids

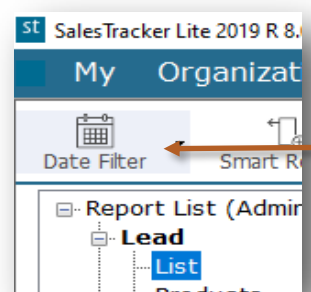
Now we will see how to use Date Filter and Smart Report from top tool bar

5.a.1

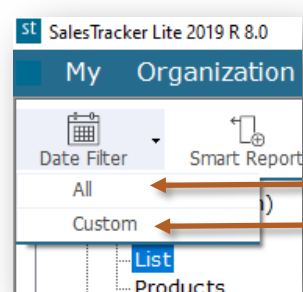
Date Filter

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**

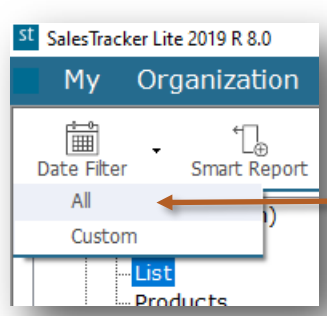


In Date Filter there are 2 options

- 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



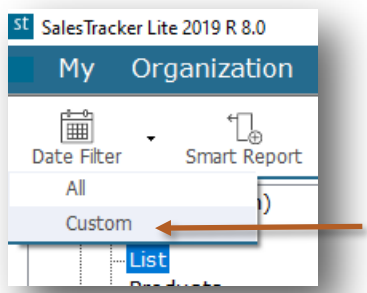
Click on **All**

You can see All Leads

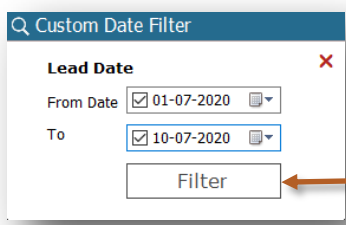
Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Lead Notes
1	01-07-2020	Ashok Enterpr...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	35000		
2	03-07-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	50000		call urgent
3	04-07-2020	Mr. Vinay Kum...	Mr. Vinay Kum...	502, Manik Ap...	9821065478	vinaykumar55...	40000		required Dell L...
4	05-07-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	50000		want Aircondit...
5	08-07-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	75000	Won	call and visit
6	10-07-2020	Mathili Bangera		605, Everest A...	8775698569	mathili50@ie...	35000		500 SQ Ft area
7	12-07-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	12000	Lost	
8	13-07-2020	Disha Enterpr...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@...	15000	Won	quote given
9	15-07-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yaho...	26000	Won	given quote fo...
10	16-07-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	70000	Won	given quote fo...

5.a.1.b Custom

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

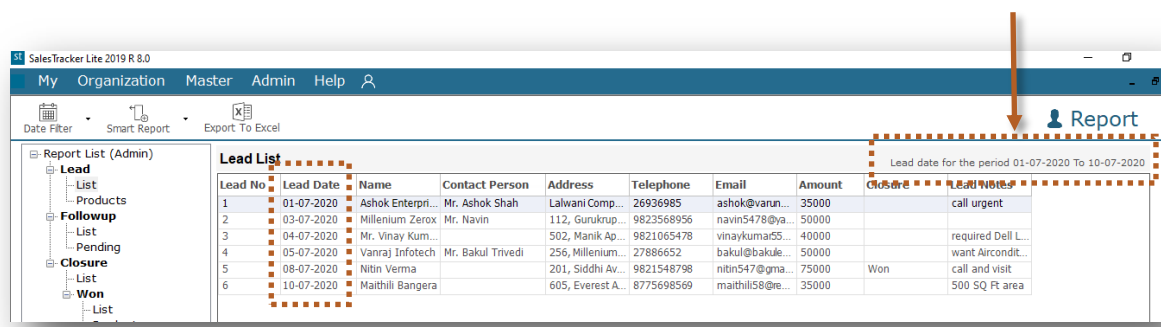


Click on **Custom**



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

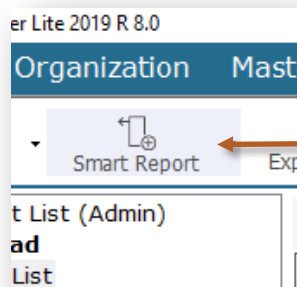
Data is filtered for **01-07-2020** to **10-07-2020**



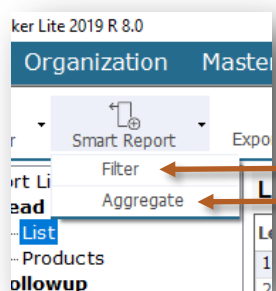
5.a.2 Smart Report

In Smart Report we can Filter and Aggregate the data.

Lets see how to use **Smart Report**



Click on **Smart Report**



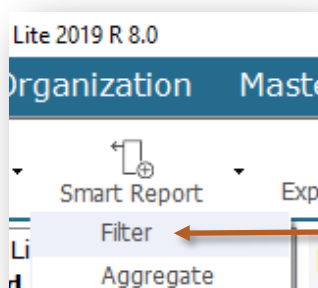
In Smart Report there are 2 options

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 date for the period 01-07-20

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Lead Notes
1	01-07-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	35000		call urgent
2	03-07-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	50000		
3	04-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	40000	Won	required Dell L...
4	05-07-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	50000		want Aircondit...
5	08-07-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	75000	Won	call and visit
6	10-07-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@re...	35000		500 SQ Ft area
7	12-07-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	12000	Lost	
8	13-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	15000	Won	quote given
9	15-07-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yaho...	26000		given quote fo...
10	16-07-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	70000	Won	given quote fo...
14	18-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	35000	Won	

Select data from drop down list

Lead date for the period 01-07-20

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Lead Notes
1	01-07-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	35000	Won	call urgent
2	03-07-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	50000		
3	04-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	40000	Won	required Dell L...
4	05-07-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	50000		want Aircondit...
5	08-07-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	75000	Won	call and visit
6	10-07-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@re...	35000		500 SQ Ft area
7	12-07-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	12000	Lost	
8	13-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	15000	Won	quote given
9	15-07-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yaho...	26000		given quote fo...
10	16-07-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	70000	Won	given quote fo...
14	18-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	35000	Won	

Data is filtered for Won

Lead date for the period 01-07-20

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Lead Notes
3	04-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	40000	Won	required Dell L...
5	08-07-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	75000	Won	call and visit
8	13-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	15000	Won	quote given
10	16-07-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	70000	Won	given quote fo...
14	18-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	35000	Won	

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

You can select multi filter for Name

Lead List Lead date for the period 01-07-

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Lead Notes
3	04-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	40000	Won	required Dell L...
5	08-07-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	75000	Won	call and visit
8	13-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	15000	Won	quote given
10	16-07-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	70000	Won	given quote fo...
14	18-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	35000	Won	

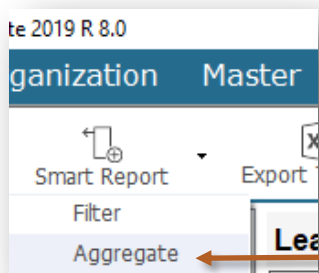
As you can see we have filtered Won data for Disha Enterprises

Lead List Lead date for the period 01-07-

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Lead Notes
3	04-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	40000	Won	required Dell L...
8	13-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	15000	Won	quote given
14	18-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	35000	Won	

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 01-07-2020 To 31-

Lead No	Σ Lead Date	Σ Name	Σ Contact Person	Σ Address	Σ Telephone	Σ Email	Σ Amount	Σ Closure	Σ Lead Notes
1	01-07-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	35000		call urgent
2	03-07-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	50000		
3	04-07-2020	Mr. Vinay Kum...		502, Manik Ap...	9821065478	vinaykumar55...	40000		required Dell La...

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

Lead List

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Lead Notes
1	01-07-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	35000		
2	03-07-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	50000		
3	04-07-2020	Mr. Vinay Kum...		502, Manik Ap...	9821065478	vinaykumar55...	40000		
4	05-07-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	50000		
5	08-07-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	75000		
6	10-07-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@re...	35000		
7	12-07-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	12000		
8	13-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	15000		
9	15-07-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yahoo...	26000		
10	16-07-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	70000		

Select Summaries

- Average
- Count
- Maximum
- Minimum
- Sum

OK Cancel

Click **OK**

Lead List

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Lead Notes
1	01-07-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	35000		
2	03-07-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	50000		
3	04-07-2020	Mr. Vinay Kum...		502, Manik Ap...	9821065478	vinaykumar55...	40000		
4	05-07-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	50000		
5	08-07-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	75000		
6	10-07-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@re...	35000		
7	12-07-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	12000		
8	13-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	15000		
9	15-07-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yahoo...	26000		
10	16-07-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	70000		
Grand Summaries							Sum = 408000		

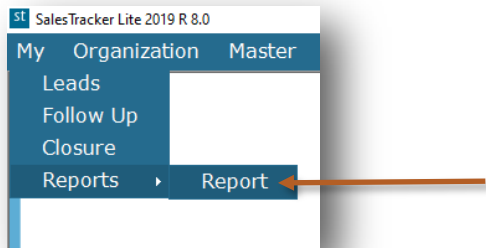
Summary of Amount

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

The screenshot shows the 'Lead List' report interface. On the left is a sidebar menu with categories: Report List (Admin), Lead, Followup, Pending, Closure, and Won. The main area displays a table of leads with columns: Lead No, Lead Date, Name, Contact Person, Address, Telephone, Email, Amount, Closure, and Lead Notes. The table contains 10 rows of data.

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Lead Notes
1	01-07-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	35000		
2	03-07-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin547@ya...	50000		
3	04-07-2020	Mr. Vinay Kum...		502, Manik Ap...	9821065478	vinaykuma55...	40000		required Dell L...
4	05-07-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	50000		want Aircondit...
5	08-07-2020	Nitin Verma		201, Siddhi Av...	9821548798	nitin547@gma...	75000	Won	call and visit
6	10-07-2020	Maithili Banger		605, Everest A...	8775698569	maithili58@re...	35000		500 SQ Ft area
7	12-07-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era...	26938574	Manohar3636...	12000	Lost	
8	13-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@...	15000	Won	quote given
9	15-07-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yaho...	26000		given quote fo...
10	16-07-2020	A to Z Consult...	Tulip Dsouza	Girija Compou...	9820102030	tulip.dsouza@...	70000	Won	given quote fo...

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, Amount, 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, 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 Notes & Next Followup Date

4

Pending

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

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

6

List

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

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

7

Products

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

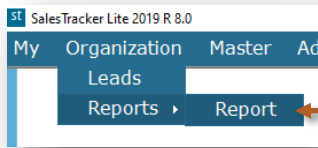
Lead No, Name, Product Name, Rate, Qty, Amount & Won Date

5.c

Organization—Reports

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

Lets see how to see Organization-Reports



Go to Menu

Organization—Reports—Report

You will get the data Sales Executive wise

Lead No	Lead Date	Name	Contact Person	Address	Telephone	Email	Amount	Closure	Notes	Assigned To
1	01-07-2020	Ashok Enterpri...	Mr. Ashok Shah	Lalwani Comp...	26936985	ashok@varun...	35000		call urgent	Admin
2	03-07-2020	Millenium Zerox	Mr. Navin	112, Gurukrup...	9823568956	navin5478@ya...	50000			Admin
3	04-07-2020	Mr. Vinay Kum...		502, Manik Ap...	9821065478	vinaykumar55...	40000		required Dell	Admin
4	05-07-2020	Vanraj Infotech	Mr. Bakul Trivedi	256, Millenium...	27886652	bakul@bakule...	50000		want Aircondi...	Admin
5	08-07-2020	Nitin Verma		201, Siddhi Av...	9821548798	ntin547@gma...	75000	Won	call and visit	Admin
6	10-07-2020	Maithili Bangera		605, Everest A...	8775698569	maithili58@re...	35000		500 SQ Ft. are...	Admin
7	12-07-2020	Vanraj Tradin...	Mr. Manohar Das	114, New Era ...	26938574	Manohar3636...	12000	Lost		Admin
8	13-07-2020	Disha Enterpri...	Mr. Vinit Kumar	Nil Kamal Esta...	278459874	vinit.kumar@g...	15000	Won	quote given	Admin
9	15-07-2020	Dilip Zaveri		112, Piramal I...	9920415241	dilip96@yaho...	26000		given quote fo...	Admin
10	16-07-2020	A to Z Consult...	Tulip Dsouza	Girinja Compou...	9820102030	tulip.dsouza@...	70000	Won	given quote fo...	Admin
11	16-07-2020	Birla Infotech...	Rubina Shaikh	Sunder Lal Co...	26869685	rubina.shaikh...	25000	Won		Yogesh Shah
12	17-07-2020	ICICI Bank	Mr. Kumar	Vashi Branch	2784512/2785...	kumar@hdfcc...	75000	Lost		Yogesh Shah
13	17-07-2020	Durgesh Gala		201 Rizvi Apar...	258635212	durgesh54@g...	25000	Won	quote given fo...	Yogesh Shah

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, Email, Login Name & Profile

2 Product
You will get the list of all the Products with following fields.
Name, code, Description & Price

Lead

3 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, Amount, Closure, Notes & Assigned To

4 Products
You will get the product wise list of Leads for all the Sales Executives with following fields.
Lead No, Date, Name, Product Name, Rate, Qty, Amount, Contact Person, Address, Telephone & Assigned To

Followup

5 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 Notes, Next Followup Date & Assigned To

6 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, Amount, Next Followup Date, Notes & Assigned To

Closure

7

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

8

List

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

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

9

Products

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

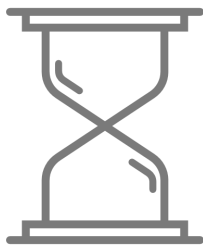
Lead No, Name, Product Name, Rate, Qty, Amount, Won Date & Assigned To

SPINSO^o

more free products



ServiceDesk^{lite}
free service CRM



TimeTracker^{lite}
free timesheet

SPINSO.com