

WELCOME TO SALES TRACKER

A tool that simplifies your sales management and amplifies growth

SALES TRACKER

A tool that makes lead management simple!

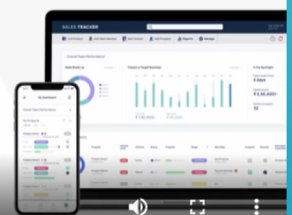
Integrating multiple communication tools used by sales people to increase productivity, promote transparency, improve internal collaboration as well as turn around time on customer requests & communication, and reduce error rate.

Get Started

COMING VERY SOON!

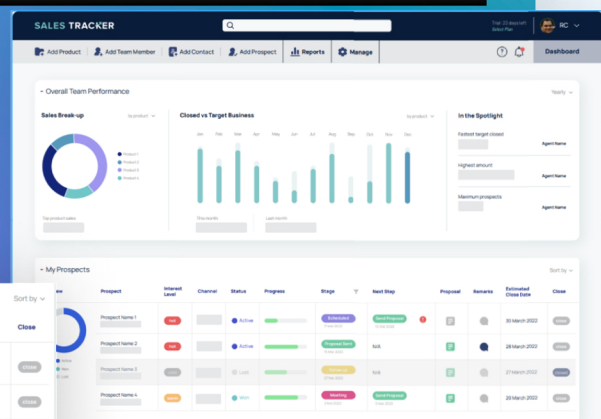
Now You Can Use
SALES TRACKER
A Lead Management Tool

0:14 / 0:34



- My Prospects

Prospect	Interest Level	Channel	Status	Progress	Stage	Next Step	Proposal	Remarks	Estimated Close Date	Close
Prospect Name 1	High	LinkedIn	Active	100%	Finalized	Send Proposal	100%		30 March 2022	Close
Prospect Name 2	High	LinkedIn	Active	100%	Proposed Sent	N/A	100%		28 March 2022	Close
Prospect Name 3	Low	LinkedIn	Lead	100%	Follow-up	N/A	100%		27 March 2022	Close
Prospect Name 4	Low	LinkedIn	Work	100%	Reviewing	Send Proposal	100%		20 March 2022	Close



Sign Up / Log In

As a first-time user, you must register as a **company/ firm/ organization/ entity**.

Set up your Sales Tracker account

Sales Tracker account you can fill in:

- Company name
- First name
- Last name
- E-mail
- Phone number
- Set up a password

The screenshot shows a registration form titled "Create Your Company Account". It contains the following fields: "Company Name", "Email", "First Name", "Last Name", "Phone", and "Password". Below the fields is a checkbox for "I agree to the terms and conditions. [Terms and Conditions.](#)". At the bottom of the form is a "Sign up" button. Below the button are three links: "Already Have An Account? [Log In](#)", "Already Member Of Task Tracker? [Import Account](#)", and "Still Have Questions Or Need Help? [Request A Free Demo ->](#)".

In case you have a **Task Tracker account (Either Premium or free)** then you are not required to create a new account for Sales Tracker by clicking on Sign up.

Click at the bottom option

"Already Member Of Task Tracker? Import Account"

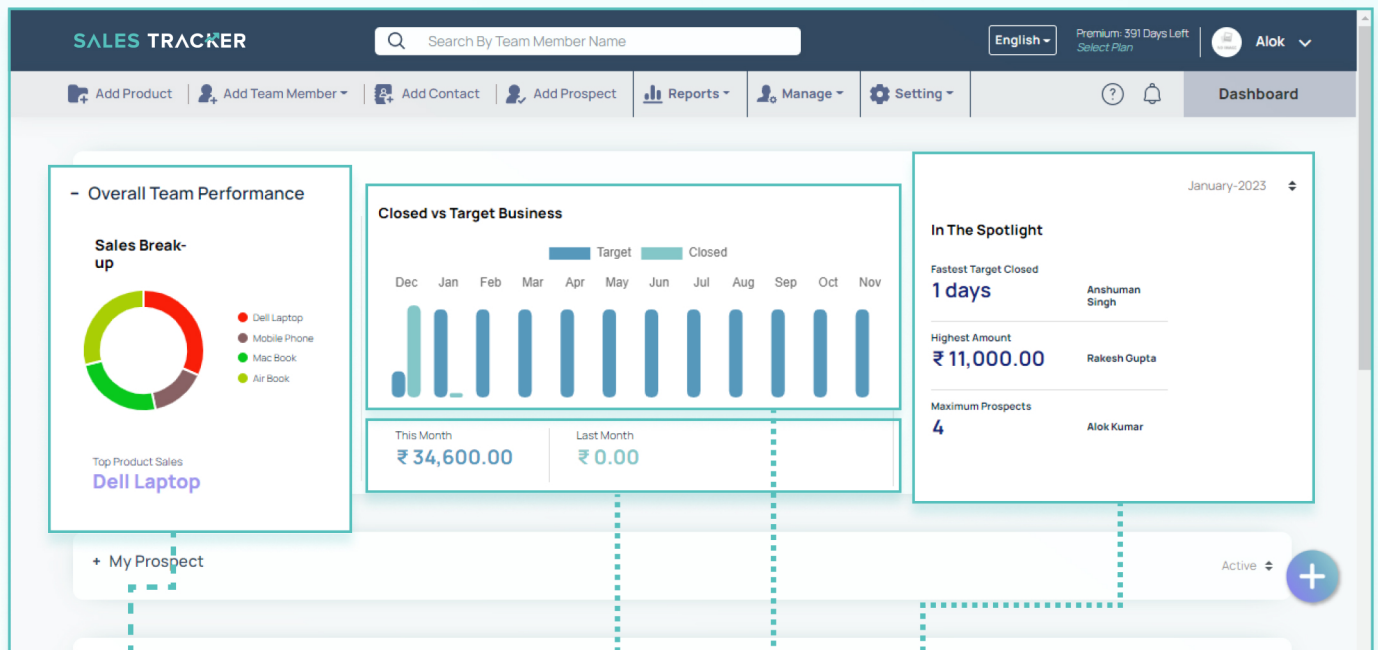
After that fill in your, Task Tracker credentials to log in to your Sales Tracker account.

This is a close-up of the bottom section of the registration form. It shows the "Phone" and "Password" input fields, the "Sign up" button, and the "Already Member Of Task Tracker? [Import Account](#)" link. A dashed line connects this link to the callout box above.

Dashboard

The Sales Tracker **Dashboard** would open after login.

Here you would see the colour-coded pie chart, bar graphs, and a spotlight section.



At the bottom, the sales amount would be displayed.

In the left-hand, the sales breakup (in the pie chart) for all the products in a colour-coded format is visible.

On the extreme right-hand section, is the Spotlight.

In the middle section, the targeted sale vs actual sales (closed) for the respective month is visible.

Here you can see:

- Fastest closed prospect
- Maximum prospect closed
- Highest sales amount for the month

In The Spotlight

Fastest Target Closed
1 days

Highest Amount
₹ 25,000.00

Alex Hells

Maximum Prospects
1

Jhonn Doe

December-2022 ▾
 December 2022
 November 2022
 October 2022
 September 2022

From the drop-down , select the **month** for which you want to see the Spotlight data.

The bell icon is for all the **web notifications**. Here you can see all kinds of notifications.

English ▾ Premium: 22 Days Left Select Plan Jhonn ▾

Dashboard

Noifications

Mark All As Read

In The Spotl
 Fastest Target C
1 days
 Highest Amount
₹ 25,000
 Maximum Prospe
1

In the bottom section, you can see All the **prospects** assigned to you and other team members with all the details.

A **colour-code pie chart** to show the active won, and lost prospects.

- Overall Team Performance

Sales Break-up

Closed vs Target Business

This Month: ₹ 25,000.00 | Last Month: ₹ 0.00

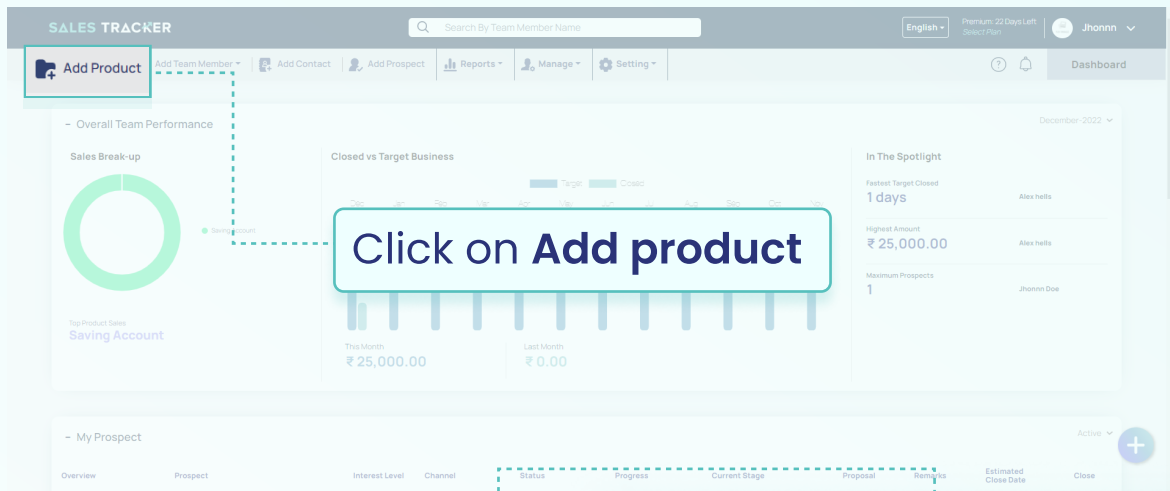
My Prospect

Alex Hells

Ben Stokes

Overview	Prospect	Interest Level	Channel	Status	Progress	Current Stage	Proposal	Remarks	Estimated Close Date	Action
<p>Jhon Cars</p> <p>● Active</p> <p>● Won</p> <p>● Lost</p> <p>View All Prospect</p>	Jhon Cars	High	Office	Active	<p>Progress bar</p> <p>90% Closed</p>	₹ 25,000.00	₹ 25,000.00		31 Dec 2022	Close

Add Product



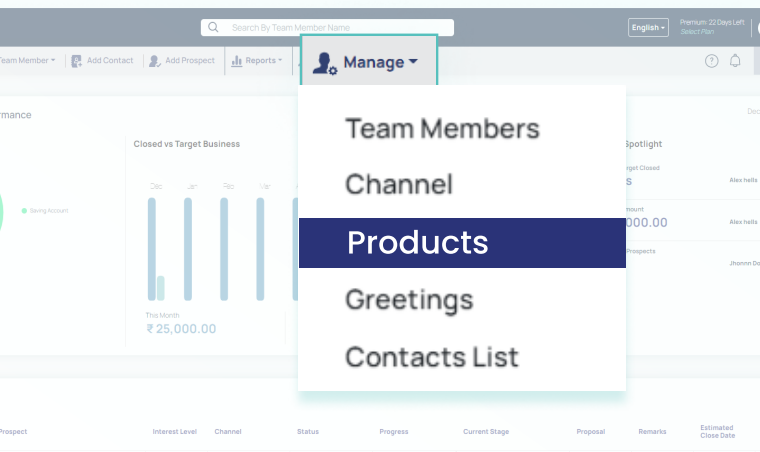
Add the **product** that you sell.

Fill in the details like **product name**, and **price type** that is, **per user**, **one time**, **per unit**.

Enter **product price**.

Add **product description**.

Click on **save**, and the message product added successfully would appear.

A screenshot of the 'ADD PRODUCT' form. The form has a title bar with 'ADD PRODUCT' and a close button. It contains several input fields: 'Product Name*' with a placeholder 'Enter Product Name', 'Price Type*' with radio buttons for 'Per User', 'One Time', and 'Per Unit', 'Product Price*' with a placeholder 'Enter Product Price', and 'Product Description*' with a placeholder 'Enter Product Description'. A blue 'Save' button is at the bottom right.

Click on **Manage -> Products** to see all the products that are added.

SALES TRACKER English Premium: 21 Days Left Select Plan Jhonn

Add Product Add Team Member Add Contact Add Prospect Reports Manage Setting Dashboard

Products

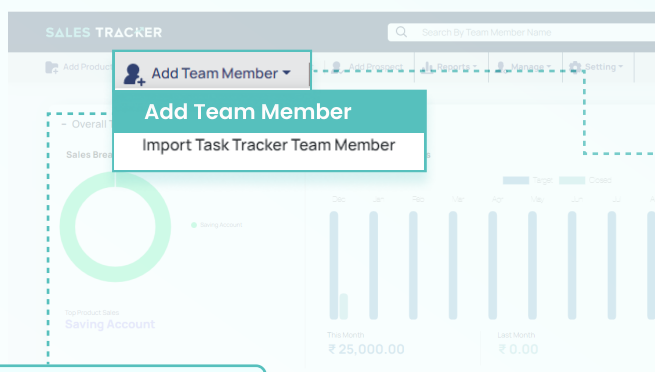
Show 10 Entries Search Records

Sr. No.	Name	Product Price	Type	Description	Action
1	Alias	250	One time	Digita product to enhance lifestyle	Edit Delete
2	Bazzball	10000	One time	Cricket bat	Edit Delete
3	Saving Account	20000	Per user	TESTING DESC	Edit Delete

Showing 1 To 3 Of 3 Entries First Previous 1 Next Last

You can **edit the product** and its details or can **delete the product** from the list as well.

Add Team Member



Under Add team member there are two options :

- Add team member
- Import Task Tracker Team Member

Add team member

ADD TEAM MEMBER

First Name*

Last Name*

Select Role*

Select Manager

Phone*

Email

Password*

Add details for a new member to be added. Details to be added are:

- Fill in **First Name & Last Name**
- Fill in the **phone number**.
- Email (optional).
- Set a password (which the user can change later on).

Select Manager

Select Manager

Phone*

Enter Phone

Email

Enter Email

Password*

Enter Password

Team Member Beat* No Yes

Assign Product

• Select **yes** or **no** for **Team Member Beat**, this is an option for location tracking of the member.

• Select a **product** that you want to assign to the **team member**.

Select Product

Saving Account

Bazzball

Alias

• Next, select the **number of units** for that particular product that you want to assign to the member.

In the box down here you can add the **sales target** for the member.

By clicking on **Assign Another Product** you can assign more the one product to the team member.

Click on **save**

Assign Product

Select Product

Number Amount

Set Monthly Target For This Product

Assign Another Product +

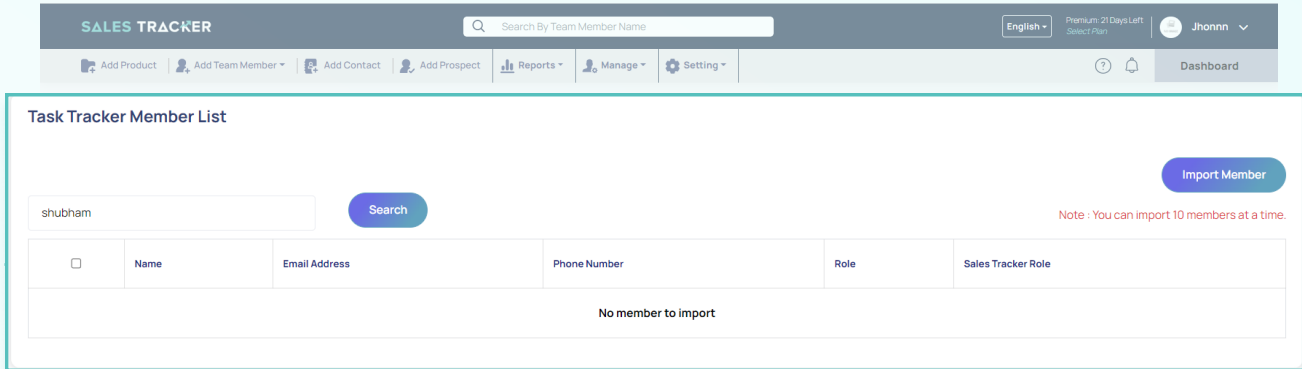
Save

First Name*

Enter First Name

The fields marked with * are essential and are required to be filled.

Import Task Tracker Team Member



- **Import Task Tracker Team Member** is an option that allows you to import members of your team that you added to the **Task Tracker**. For this, you should **log in with the Task Tracker account**.

Assigning roles

Choose a role for a new member:

- **Manager** : Who have the access to all the team member, product, contact, and prospect. They don't have access to delete any data point.

Select Role

Select Role

Manager

Users Designated As Managers Can Check All The Details About Team Members, Products, Contacts, And Prospects. They Don't Have Access To Delete Any Data Points.

Team Member

Team Members Can View, Add And Update Prospects Assigned By Them And Assigned To Them By Managers. Team Members Can View Products, Contacts, And Prospects. They Don't Have Access To Delete Any Data

○ **Team Member** : They can check all products, contacts, prospects, etc assigned by them or assigned to them by the managers, but not of any other team member. Like Managers, they don't have access to delete any data point.

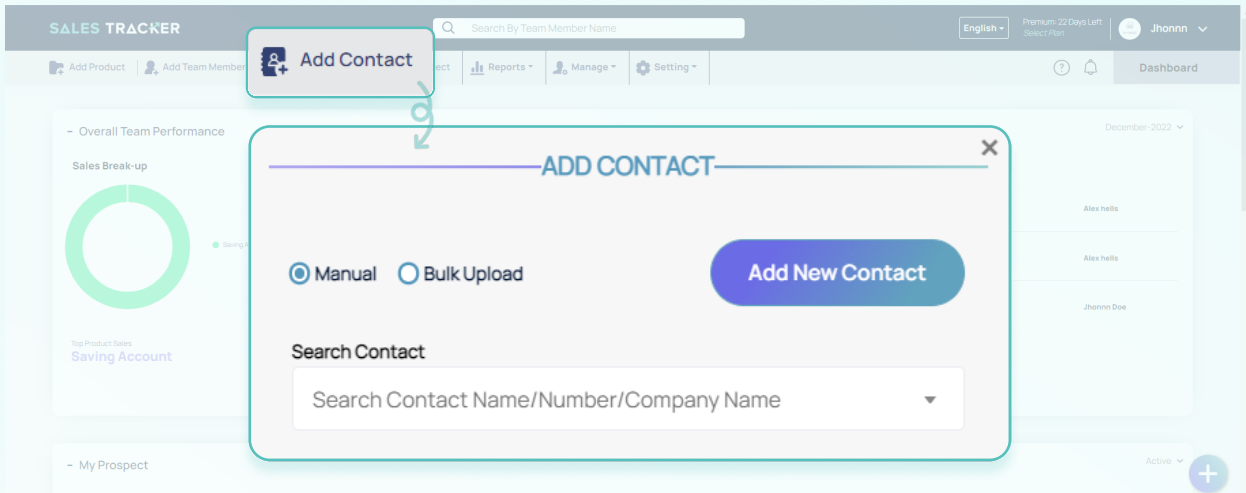
You have the option to select the **Manager** for the team member you are adding.

You can **Assign a Manager** to a member whose role is selected as **Manager** as well.

You can assign multiple **Managers** for notification.

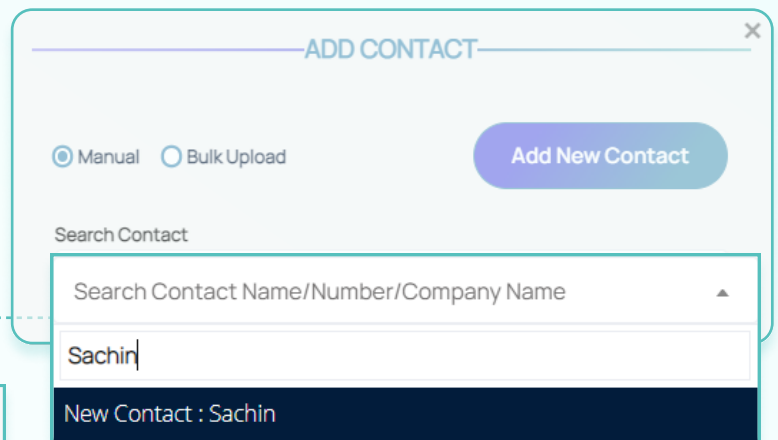
Add New Contacts

Click on **Add Contacts** you can add new contact details



Here you would find two options: Manual Bulk Upload

In **Manual upload**, you can **search for contact** (the contacts you have already added).



Manual Bulk Upload **Add New Contact**

This is a new entry.

First Name* **Last Name***

Phone*

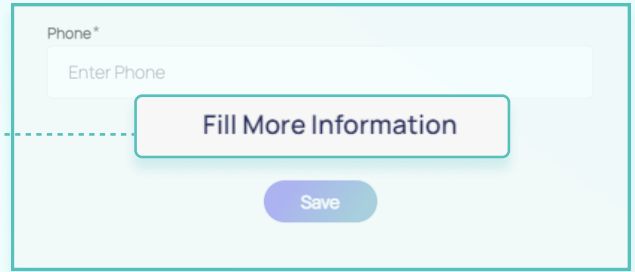
Fill More Information

Save

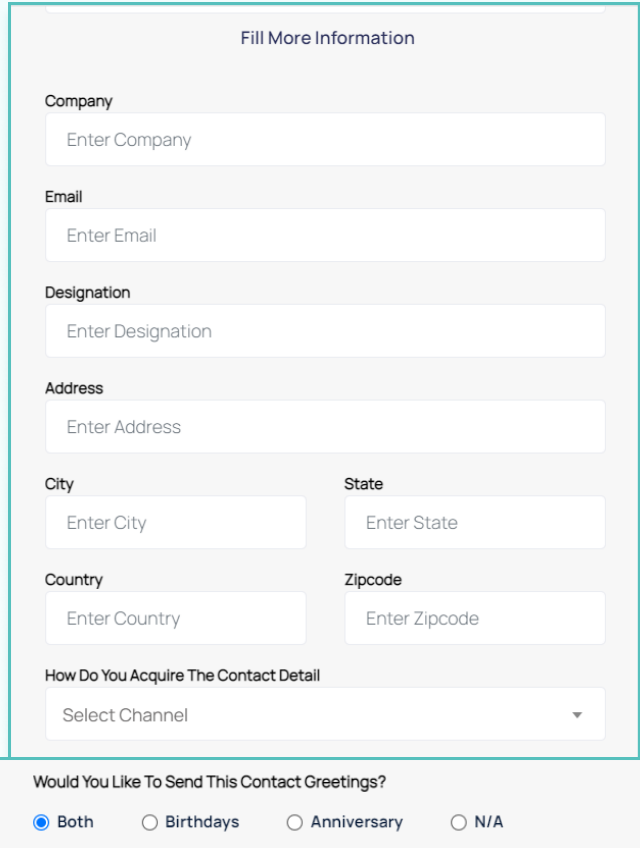
- By clicking on **Add New Contact**.
- You can add contacts manually one by one.
- Fill in the First name.
- Last name.
- Phone number.

These are basic and essential details required to add a contact.

By clicking on **fill more information** you can add further details if want like designation, city, etc.

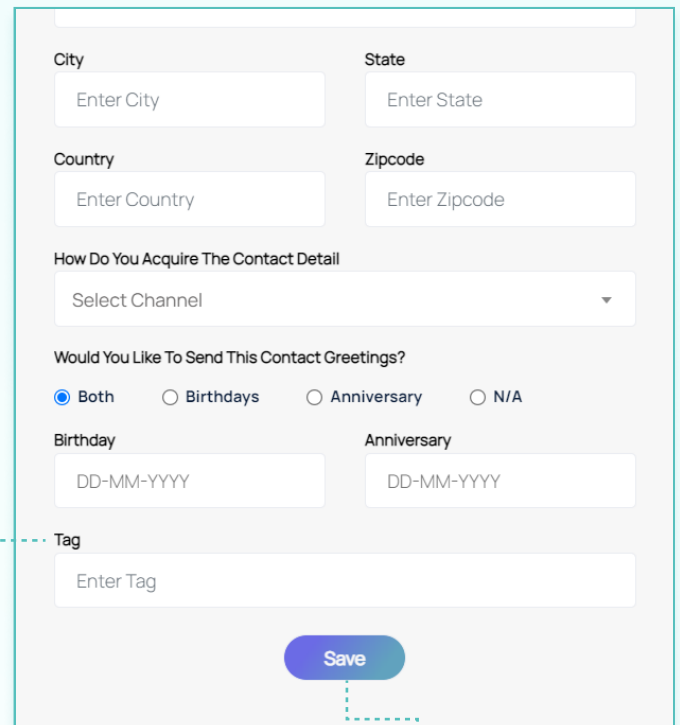


A screenshot of a contact form section. At the top, there is a 'Phone*' field with a placeholder 'Enter Phone'. Below it is a prominent blue button labeled 'Fill More Information'. At the bottom of this section is a smaller blue button labeled 'Save'.



A screenshot of the 'Fill More Information' form. It contains several input fields: 'Company' (Enter Company), 'Email' (Enter Email), 'Designation' (Enter Designation), 'Address' (Enter Address), 'City' (Enter City), 'State' (Enter State), 'Country' (Enter Country), and 'Zipcode' (Enter Zipcode). There is also a dropdown menu for 'How Do You Acquire The Contact Detail' with 'Select Channel' as the current selection. At the bottom, there are radio buttons for 'Would You Like To Send This Contact Greetings?' with options: 'Both' (selected), 'Birthdays', 'Anniversary', and 'N/A'.

- Here you can Add Birthdays, Anniversaries of the contact (say client) and set a **personalized greeting** to be sent to them on the specific date.



A screenshot of the 'Fill More Information' form, showing the bottom section. It includes the 'City', 'State', 'Country', and 'Zipcode' fields. Below these is the 'How Do You Acquire The Contact Detail' dropdown. The 'Would You Like To Send This Contact Greetings?' section has radio buttons for 'Both' (selected), 'Birthdays', 'Anniversary', and 'N/A'. Below this are two date input fields: 'Birthday' (DD-MM-YYYY) and 'Anniversary' (DD-MM-YYYY). There is also a 'Tag' field (Enter Tag) and a blue 'Save' button at the bottom.

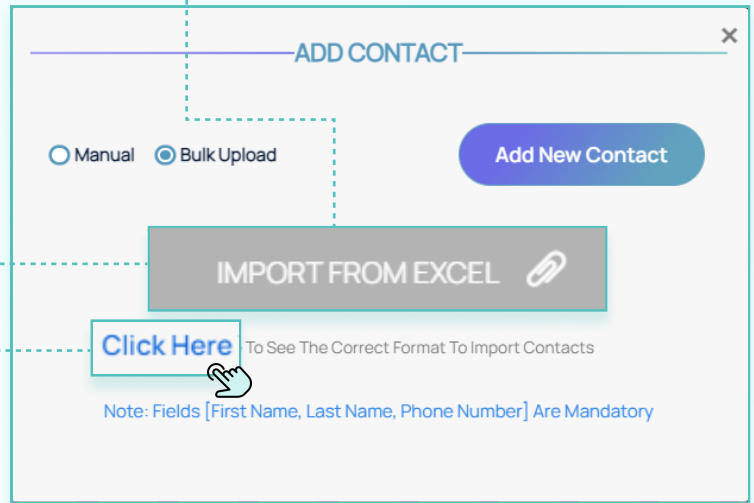
Also, you can **enter a Tag** (say potential lead, an existing client, etc).

Click on save and the message contact **Saves** successfully would appear.

With **bulk upload**, you can add multiple contacts at a time. For this, you can select an **Excel file** with the details of all the contacts to be added for upload.

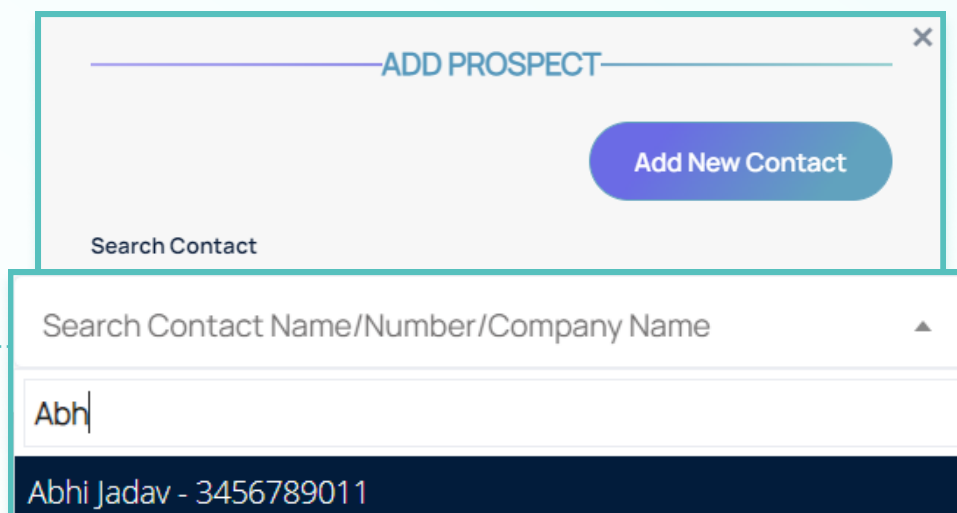
- Manual
- Bulk Upload

The file should have the extension as **.CSV**



With **Click Here** you can download and see the sample Excel file. The Excel file you want to upload should **have the data organized in the same way and format as the sample file**.

Add Prospects



- Click on **Search Contact**.

Here you can select a contact from the contacts that you have added:

The details of the contact would appear.

Select the **Product**.

Products that you have added would appear in the drop-down menu.

Next select the interest level of the prospect:
Hot, warm, cold.

Interest Level* **Hot** Warm Cold
Channel*

From **Channel**, you can select the channel from which you have got the contact/client, say online, offline, or partner.

Choose the **estimated close date** for the prospect.

ADD PROSPECT [X]

Add New Contact

Search Contact
Abhi Jadav - 3456789011

Contact Details

First Name: Abhi
Last Name: Jadav
Phone Number: 3456789011

Prospect Name*
Abhi Jadav

Select Products*
Select Products Amount

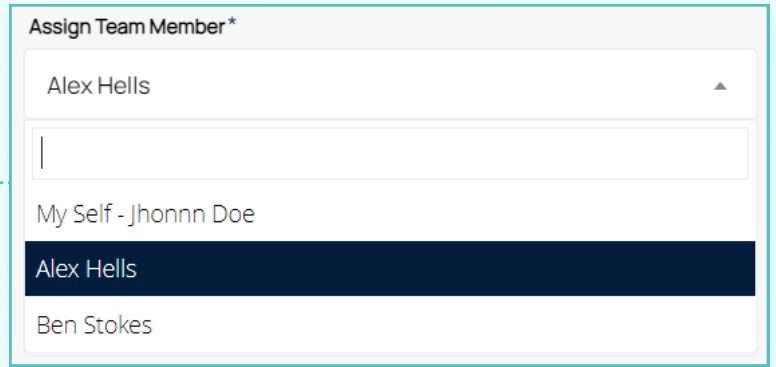
Saving Account
Bazzball
Alias

Channel*
Offline
Select Channel
Online
Offline
Partner

Estimated Close Date*
15-12-2022

Select Team Member
Assign Next Stage
Select Next Stage

Assign a **Team Member** for the prospect.



Assign Team Member*

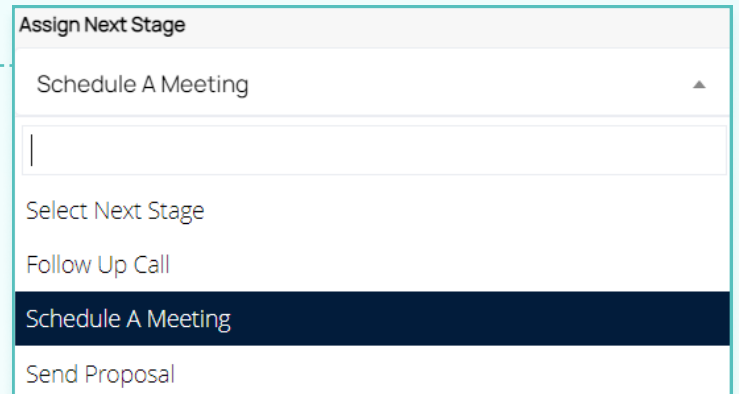
Alex Hells

My Self - Jhonn Doe

Alex Hells

Ben Stokes

Choose the next step like a **follow-up call**, **schedule a meeting**, or **send a proposal** (in case you want to send another proposal).



Assign Next Stage

Schedule A Meeting

Select Next Stage

Follow Up Call

Schedule A Meeting

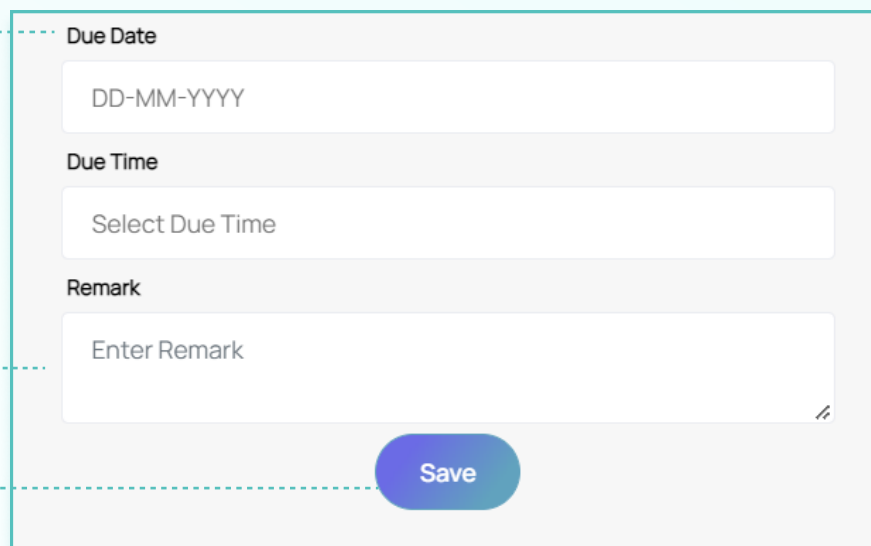
Send Proposal

Pick a **due date**.

Enter **remarks** (if any).

Click on **save**.

The **prospect** would be assigned to the team member.



Due Date

DD-MM-YYYY

Due Time

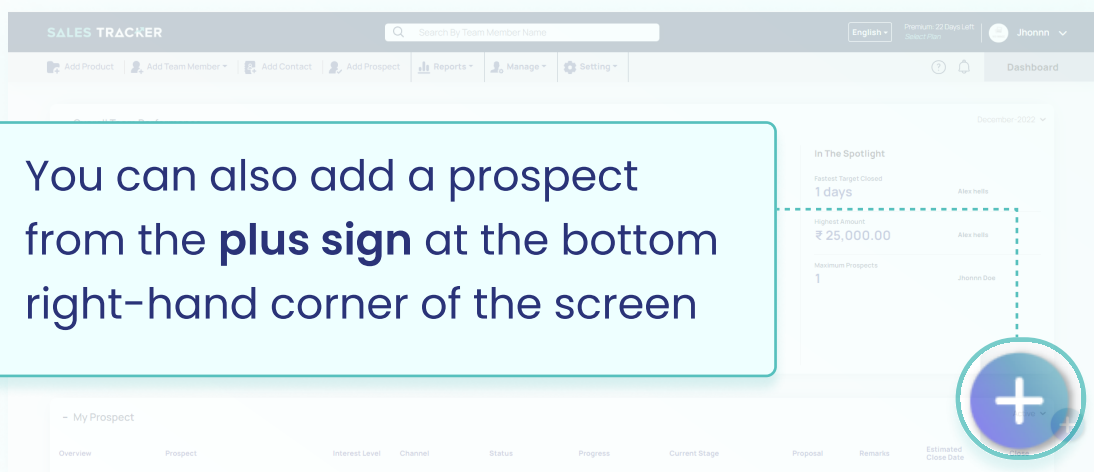
Select Due Time

Remark

Enter Remark

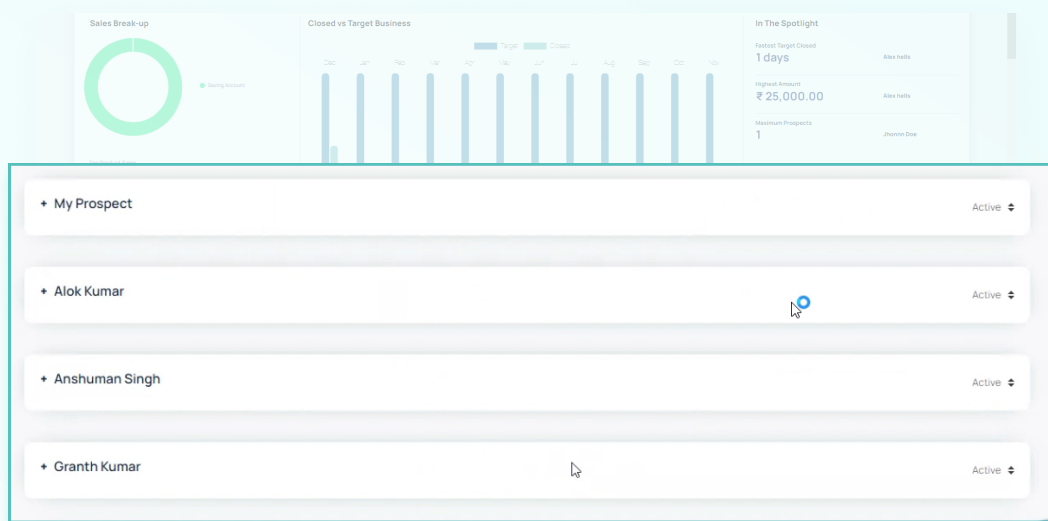
Save

You can also add a prospect from the **plus sign** at the bottom right-hand corner of the screen



Prospect once added can be viewed on **dashboard**.

On the dashboard, you can see all the **team members** in the bottom section.



Here you can select the team member. Once you click on the team member's name.

The image shows a dashboard with a list of prospects. A callout box highlights the 'My Prospect' section. Below it, a table displays the following data:

Overview	Prospect	Interest Level	Channel	Status	Progress	Stage	Next Step	Proposal	Remarks	Estimated Close Date	Close	
	Prospect Name 1 Product Name	hot	Online	Active	<div style="width: 50%;"></div>	Scheduled 11 Mar 2022	Send Proposal 15 Mar 2022				30 March 2022	close
	Prospect Name 2 Product Name	hot	Partner	Active	<div style="width: 75%;"></div>	Proposal Sent 15 Mar 2022	N/A				28 March 2022	close
	Prospect Name 3 Product Name	cold	Offline	Lost	<div style="width: 20%;"></div>	Follow up 27 Feb 2022	N/A				27 March 2022	closed
	Prospect Name 4 Product Name	warm	Online	Won	<div style="width: 90%;"></div>	Meeting 3 Feb 2022	Send Proposal 5 Mar 2022				20 March 2022	close

You can see all the data for that member. Information like **prospects assigned**, the **status of the prospect**, the **current stage of the prospect**, **estimated close date**, etc would be visible.

Click on any particular **prospect**.

The screenshot displays a 'My Prospects' dashboard. At the top, there's a navigation bar with 'Overview', 'Prospect', 'Interest Level', 'Channel', 'Status', 'Progress', 'Stage', 'Next Step', 'Proposal', 'Remarks', 'Estimated Close Date', and 'Close'. A table lists several prospects, with 'Prospect Name 1' highlighted. Below the table, a 'Prospect Detail' modal is open for 'Ravi Kumar'. The modal includes fields for 'Team Member' (Alok kumar), 'Product' (Router, Mobile Phone), 'Estimated Amount' (₹ 300.00, ₹ 200.00), 'Total Est. Amount' (₹ 500.00), 'Estimated Close Date' (31-12-2022), and 'Interest Level' (Hot, Warm, Cold). It also has sections for 'Channel' (Online, Offline, Partner), 'Assign Next Stage' (Select Next Stage), 'Due Date' (DD-MM-YYYY), and 'Due Time' (Select Time). A 'Close Prospect' button is at the top right. Below the main form, there's a 'Prospect Detail' table with columns for 'Current Stage', 'Created Date', 'Due Date', and 'Share'. The 'Follow Up Call' row shows a date of 15 Dec 2022 and a due date of 16 Dec 2022 05:52 PM. A 'Prospect History' section shows a 'New' action on 15 Dec 2022. On the right, there are sections for 'Contact Details' (First Name: Ravi, Last Name: Kumar, Email: r@x.in, Phone Number: 1000567890, Location: Delhi, County: India, State: Gujarat, City: Surat, Zipcode: 395001, Birthday: 17 November 1990, Anniversary: 18 November 2020), 'Remarks' (No Remarks), and 'Proposal'.

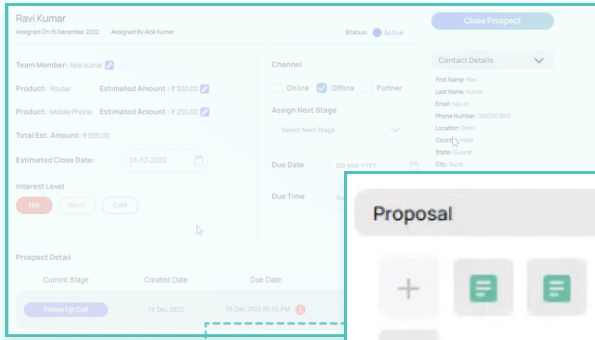
Here all the **details** related to **particular prospects** would be visible.

You can see the **due date and due time** of the prospect.

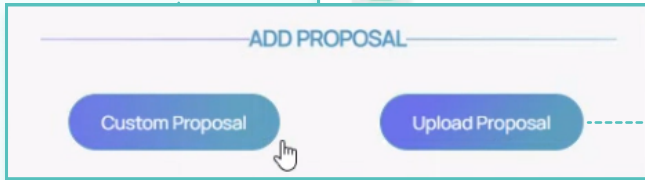
Further, the under **history section** you can see the actions taken so far on a particular prospect like calling, follow-up, etc.

The agents can easily manage the prospect from here and can make changes like changing the stages from **follow-up calls**, **setting up meetings & sending proposals**.

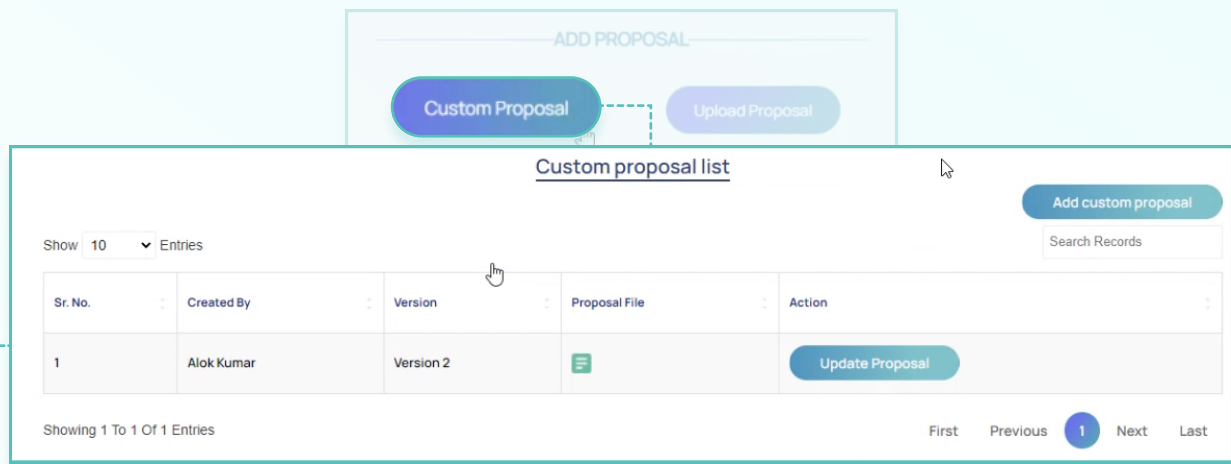
This close-up shows the 'Assign Next Stage' section of the prospect detail modal. It includes radio buttons for 'Online', 'Offline' (checked), and 'Partner'. Below this, there are three large, rounded buttons: 'Follow Up Call' (purple), 'Schedule A Meeting' (green), and 'Send Proposal' (yellow). A hand cursor is pointing at the 'Send Proposal' button.



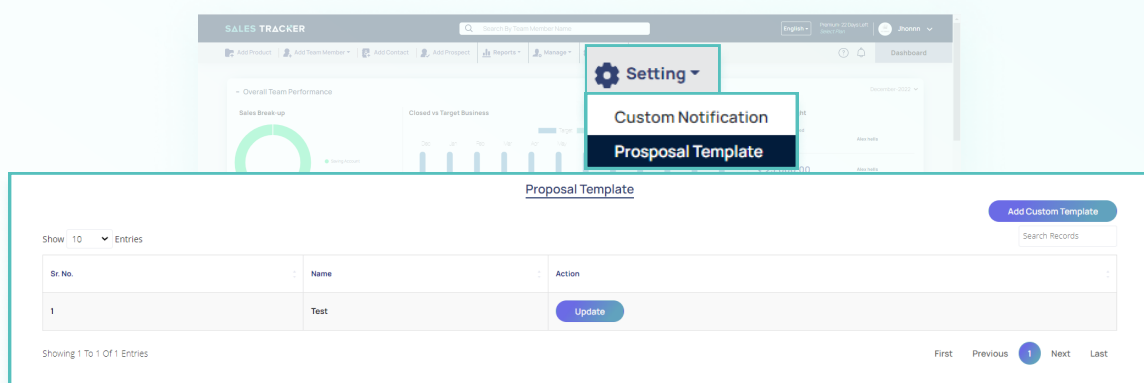
To send a proposal, you need to click on the plus sign and it gives you two options **Custom Proposal** or **Upload Proposal**.



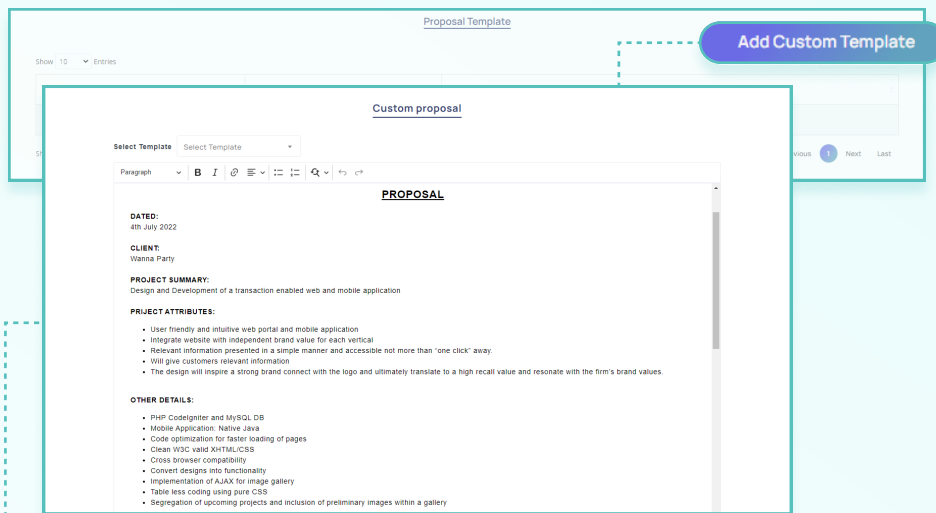
Clicking on **Upload Proposal** you can simply upload the proposal file from your computer.



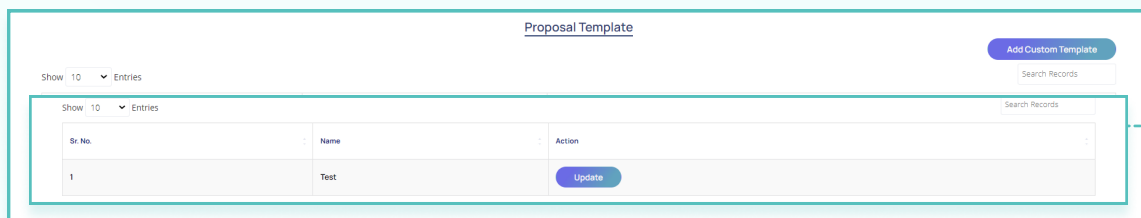
Whereas clicking on the **Custom Proposal** gives you an option of sending the proposal in a custom template.



Here you can create a **proposal template** for the proposals that you want to share with clients.



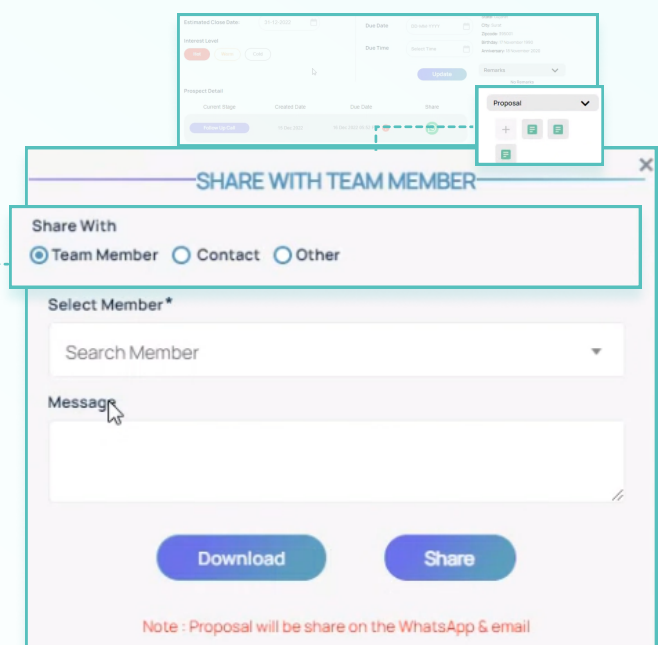
There is a **default template** already there in the Sales Tracker. For your custom template, you can add click on **Add Custom Template** and create a new template as per your needs.

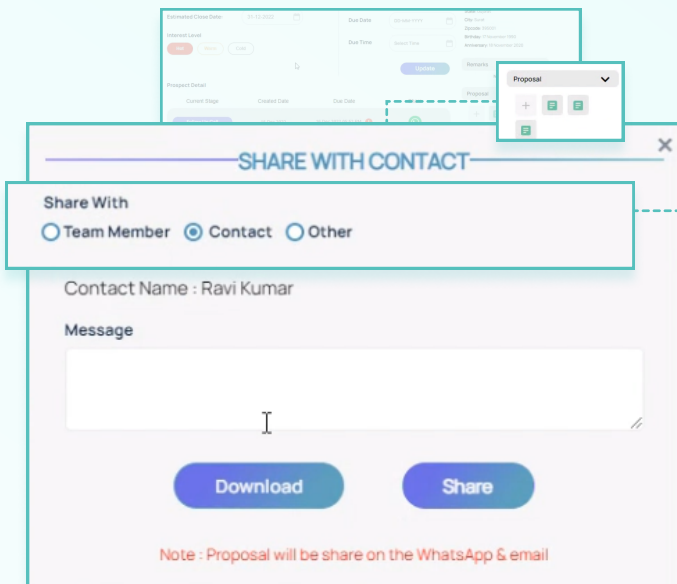


Under the proposal template, you can see all the **templates** that you have created. This comes in handy when you have to send multiple proposals to the client say the initial proposals and then the final proposal for closing the deal.

Once you have added the proposal you get **3 options** for sharing the proposal.

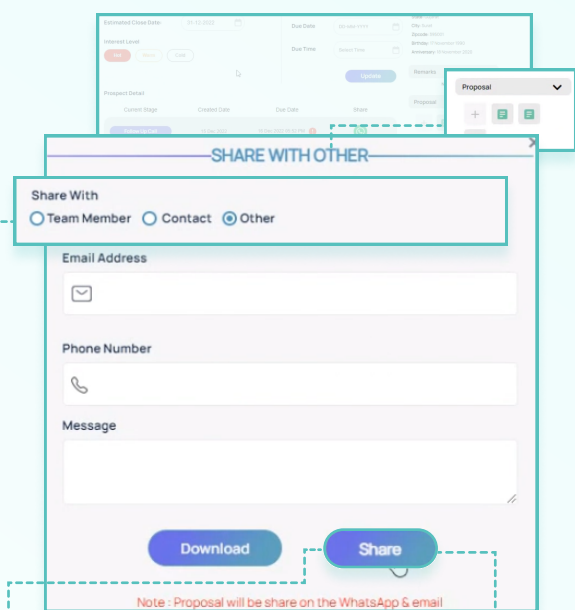
You can select a **team member** if you want to share a proposal with any of your team members.



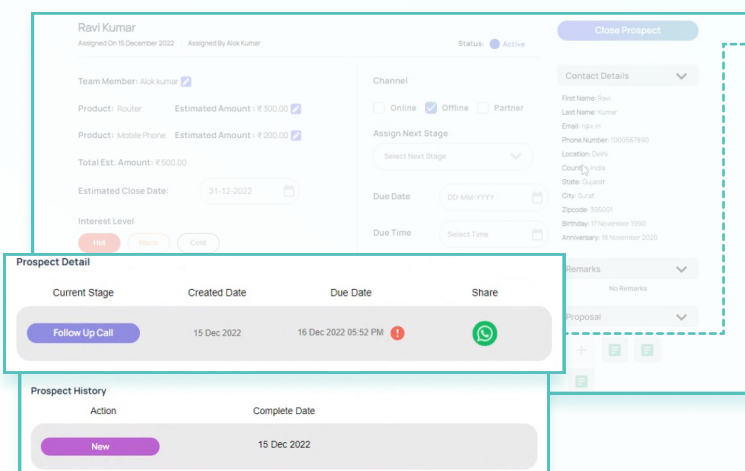


● The next option is to share the **proposal with a contact**. You can select a contact name, and add a message, the message can be any information that you want to pass to the person with whom the prospect would be shared.

In case you want to share a **prospect with a third person** that is not your team member or your contact then you can do so by filling in their e-mail and phone number.



In all cases, a message on  **Whatsapp** and  **G-Mail** would be sent to the person with whom the prospect is shared.



● You can also check all the proposal initial as well as revised ones that have been shared with the client.

The proposal is shared in **pdf format** on the client's **WhatsApp and E-mail**.

For closing a prospect you should click on the **Close Prospect**.

Here you can select **won** for the prospects that have been successfully closed say they have converted into sales. You have to fill in the details like the won amount for all the products that were part of the prospect.

For **lost prospects**, you have to fill in the reason why the prospect was not successful, for example, the client was not interested.

Click on **save** and the prospect would be closed.

Reports

Sales Report

Click on **Search**

Select **Status (won, active, lost)**
(Here: Active for open prospects, won for prospects that are closed by the team member who was assigned the prospect as won. Lost for prospects that are closed as lost).

The screenshot shows the SALES TRACKER interface. At the top, there is a search bar for team member names and a 'Reports' button. Below this, the 'Sales Report' filter is visible, including fields for 'From Date', 'To Date', 'Team Member', 'Product', 'Current Stage', 'Status', and 'Channels'. A table below the filter displays sales entries with columns for Sr. No., Prospect Name, Assign To, Assign By, Assign Date, Est. Close Date, Current Stage, Status, Product Name, and Remark. The table shows three entries: 1. Jhon Cena (Alex hells) - Won, 2. Jhon Cena (Jhonn Doe) - Active, 3. Virat Kohli (Ben Stokes) - Active.

Sr. No.	Prospect Name	Assign To	Assign By	Assign Date	Est. Close Date	Current Stage	Status	Product Name	Remark
1	Jhon Cena	Alex hells	Jhonn Doe	05-12-2022	31-12-2022	Send Proposal	Won	Saving Account	
2	Jhon Cena	Jhonn Doe	Jhonn Doe	05-12-2022	31-12-2022	Schedule A Meeting Due Date : 30 Dec 2022	Active	Saving Account	
3	Virat Kohli	Ben Stokes	Jhonn Doe	09-12-2022	17-12-2022	Follow Up Call Due Date : 17 Dec 2022	Active	Bazzball	

Select the **date range**.

Pick **Products/product**.

Select **Team members/ Team member**.

Select a **Current stage (follow-up, call, schedule a meeting, etc)**.

The entire sales report with all the details as selected above would be visible. You can select the details for individual team members or multiple and similarly for individual products or multiple.

Sales Report

From Date: DD-MM-YYYY To Date: DD-MM-YYYY Team Member: All Selected (3) Product: None Selected Current Stage: None Selected Status: None Selected Channels: None Selected

Search Clear Filter **Export**

Show 10 Entries

Sr. No.	Prospect Name	Address	City	State	Country	Current Stage	Product Name	Remark
1	Jhon							
2	Jhon							
3	Virat							

Showing 1 To 3 of 3 Entries

Next Last

Clicking on the **export** option, you can download the Sales report in **Excel** format.

Team Member Beat

SALES TRACKER

Search By Team Member Name

English Premium: 22 Days Left Select Plan Jhonn

Add Product Add Team Member Add Contact Add Prospect Reports Manage Setting Dashboard

Overall Team Performance

Sales Break-up Closed vs Target Business

In The Spotlight Fastest Target Closed 1 days Alex hells Alex hells Jhonn Doe

December-2022

Team Member Beat

Date: 09-12-2022 Team Member: Ben Stokes Search

Top Product S...

Location list

Sr. No.	Address	City	State	Zipcode	Time
1	Talkatora Road, Rakab Ganj, New Delhi - 110004, Delhi, India	New Delhi	Delhi	110001	11:04 AM
2	Talkatora Road, Rakab Ganj, New Delhi - 110004, Delhi, India	New Delhi	Delhi	110001	11:04 AM
3	Gurudwara Rakab Ganj, Talkatora Road, Rakab Ganj, New Delhi - 110004, Delhi, India	New Delhi	Delhi	110001	11:00 AM
4	Parliament Complex, Lok Sabha Marg, Rakab Ganj, New Delhi - 110004, Delhi, India	New Delhi	Delhi	110001	11:00 AM
5	Parliament Complex, Lok Sabha Marg, Rakab Ganj, New Delhi - 110004, Delhi, India	New Delhi	Delhi	110001	10:59 AM
6	Parliament Complex, Lok Sabha Marg, Rakab Ganj, New Delhi - 110004, Delhi, India	New Delhi	Delhi	110001	10:59 AM

- Under this, you can select the date and team member and click on search to see the login and log-out history of the team member with the location as displayed below powered by **GPS tracking** and **Google maps**.
- For the team member whose beat is selected as yes the beats would be visible.
- For the team members whose beat is selected as No, then in **Manage -> Team Members**, you can edit that to yes.

Team Member Sales Report

You can see each **team member's sales report** by selecting a **date range** here.

Say for example for a specific month of 30 days.

Team Member Sales Report

From Date: DD-MM-YYYY To Date: DD-MM-YYYY Team Member: Alex Hells

Search Clear Filter Export

Total Prospect: 1 Prospect Won: 1 Prospect Lost: 0 Active Prospect: 0
Won Amount: 25000 Won %: 100.00

Sr. No.	Prospect Name	Assign To	Assign Date	Est. Close Date	Status
1	Jhon Cena	Jhannon Doe	05-12-2022	31-12-2022	Won

Team Member Sales Report

From Date: DD-MM-YYYY To Date: DD-MM-YYYY Team Member: Alex Hells

Search Clear Filter Export

Total Prospect: 1 Prospect Won: 1 Prospect Lost: 0 Active Prospect: 0
Won Amount: 25000 Won %: 100.00

Sr. No.	Prospect Name	Assign By	Assign Date	Est. Close Date	Status
1	Jhon Cena	Jhannon Doe	05-12-2022	31-12-2022	Won

The following details are visible on the sales report :

- Total Prospect
- Prospect Won
- Prospect Lost
- Active Prospect
- Won Amount
- Won %

Download the sales report by clicking on **Export** in Excel format.

Team Member Target Report

SALES TRACKER

Search By Team Member Name

English Premium: 22 Days Left Select Plan Jhonn

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Overall Team Performance

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In The Spotlight

Fastest Target Closed 1 days Alex Hells

Sales Report
Team Member Beat
Team Member Sales Report
Team Member Target Report

Team Member Target Report

From Month: MM-YYYY To Month: MM-YYYY Team Member: Alex Hells

Search Clear Filter Export

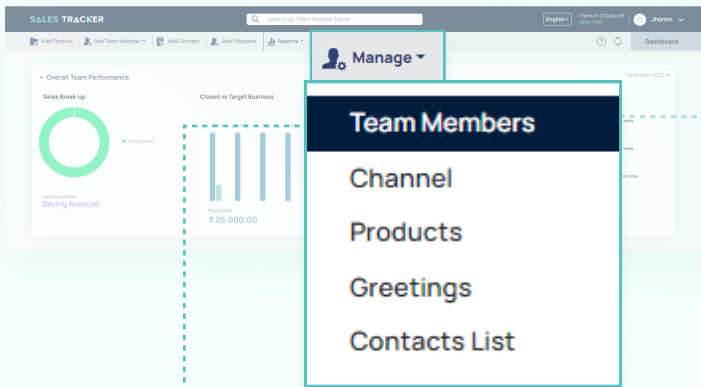
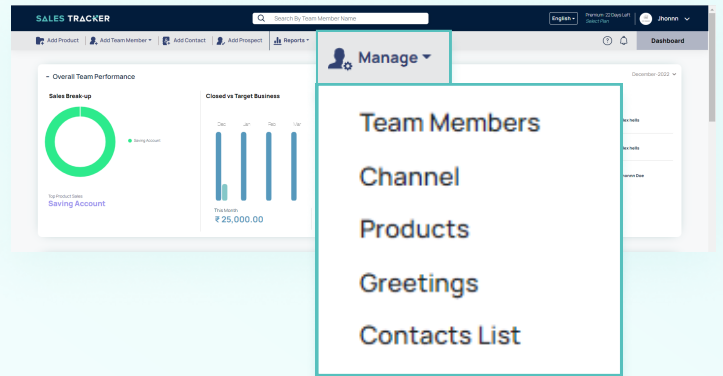
Sr. No.	Month	Target	Closed
1	Dec-2022	10000	25000

Under this section, you can see the **target report of sales** for the individual member for a **range of months** and can download the same in Excel format by clicking on Export.

Manage

Under manage, you can edit and delete details related to:

- Team members
- Channel
- Products
- Greetings
- Contact Lists



In **Manage -> Team members** you can see all the team members and from here you can edit the team members' details or can delete the team members as well.

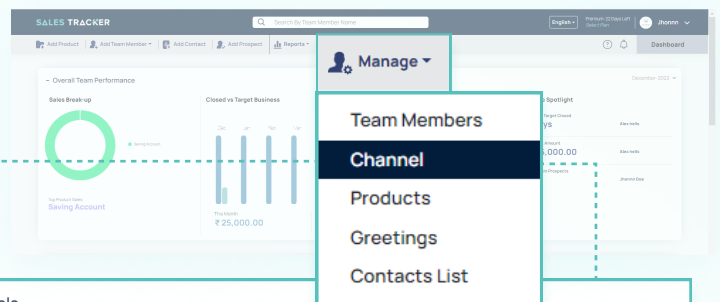
Team Members

Show 10 Entries Search Records

Name	Email	Phone	Action
Alex hells		1235689536	<button>Update</button> <button>Suspend</button> <button>Delete</button>
Ben Stokes		9897979797	<button>Update</button> <button>Suspend</button> <button>Delete</button>

Showing 1 To 2 Of 2 Entries First Previous 1 Next Last

Manage->Channel you can add, edit or delete any channel name that you want.



Channels

Show 10 Entries Add Channel Search Records

Sr. No.	Channel Name	Action
1	Offline	<button>Edit</button> <button>Delete</button>
2	Online	<button>Edit</button> <button>Delete</button>

Under, **Manage** -> **Products** you can see all the products you have added.

Sr. No.	Name	Product Price	Type	Description	Action
1	Alias	250	One time	Digit product to enhance lifestyle	Edit Delete
2	Bazzball	10000	One time	Cricket bat	Edit Delete
3	Saving Account	20000	Per user	TESTING DESC	Edit Delete

Showing 1 To 3 Of 3 Entries

From here you can **edit the product** and its details or can **delete the product** from the list as well.

In **Greetings**, you can see the scheduled greeting reminders.

Type	Message	Action
Birthday Greeting	happy Birthday	Edit Delete

Showing 1 To 1 Of 1 Entries

With **Manage** -> **contact** list you can see all the added contacts. Here you can edit or delete the contacts.

Sr. No.	Name	Phone	Company Name	Tag	Action
1	Abhi Jadv	3456789011			Edit Delete
2	Great Khan	1234567892	Facebook	Delhi event	Edit Delete
3	Jhon Doe	1234567890	Microsoft	Delhi event	Edit Delete
4	Jhon Cena	1234567891	Google	Delhi event	Edit Delete
5	Sundar Lal	1234567893	Twitter	Delhi event	Edit Delete
6	Virat Kohli	9999999999			Edit Delete

Showing 1 To 6 Of 6 Entries

Settings

Click on the **Custom Notification**.

The screenshot shows the 'SALES TRACKER' interface with the 'Setting' menu open. A 'Custom Notification' dialog box is overlaid on the 'Notification Preferences' section. The dialog box contains a table with columns for 'Email Notification', 'Whatsapp Notification', 'Web Notification', and 'App Push Notification'. The 'Notification Name' column lists various activities, and checkboxes indicate which notification methods are enabled for each activity. A 'Save Notification Settings' button is at the bottom of the dialog.

Notification Name	Email Notification	Whatsapp Notification	Web Notification	App Push Notification
Add Prospect	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Close Prospect	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
New Remark	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Update Prospect	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
New Proposal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Plan Expiry Notification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Prospect Due In One Day	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Prospect No Action In Two Days	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Prospect Stage Overdue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Here you can switch on or off notifications for :

- **E-mail, WhatsApp.**
- **Web notifications** for the activities you do like **sharing prospects, add contacts** and **sharing prospects**.

WhatsApp Notifications

Notification on **WhatsApp** would be available for events like:

- Adding a team member and importing a member to Sales Tracker from Task Tracker.
- Assigning of prospects.
- Tagging in a prospect.



Contact Us



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