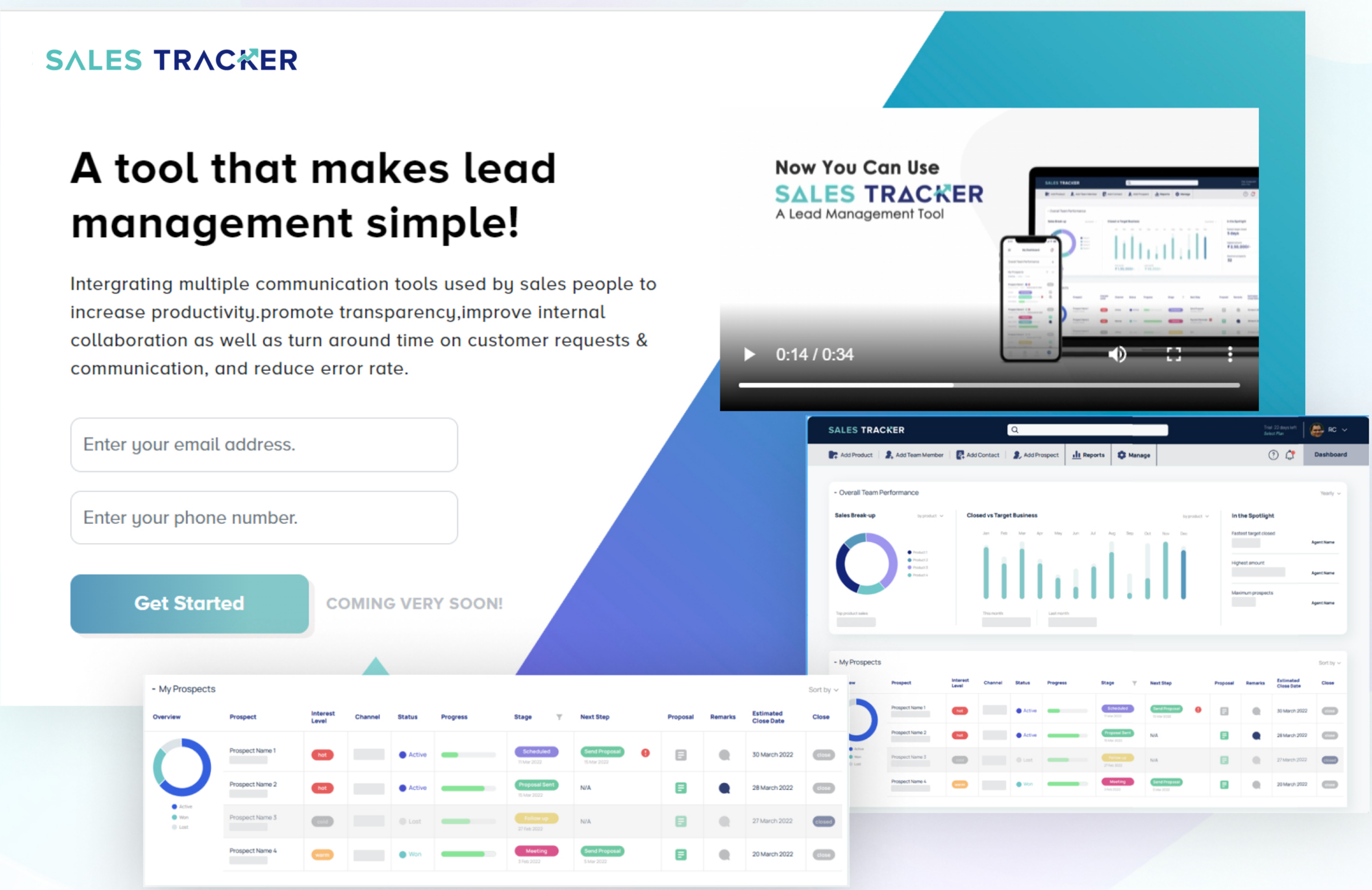
WELCOME TO

SALES TRACKER

A tool that simplifies your sales management and amplifies growth



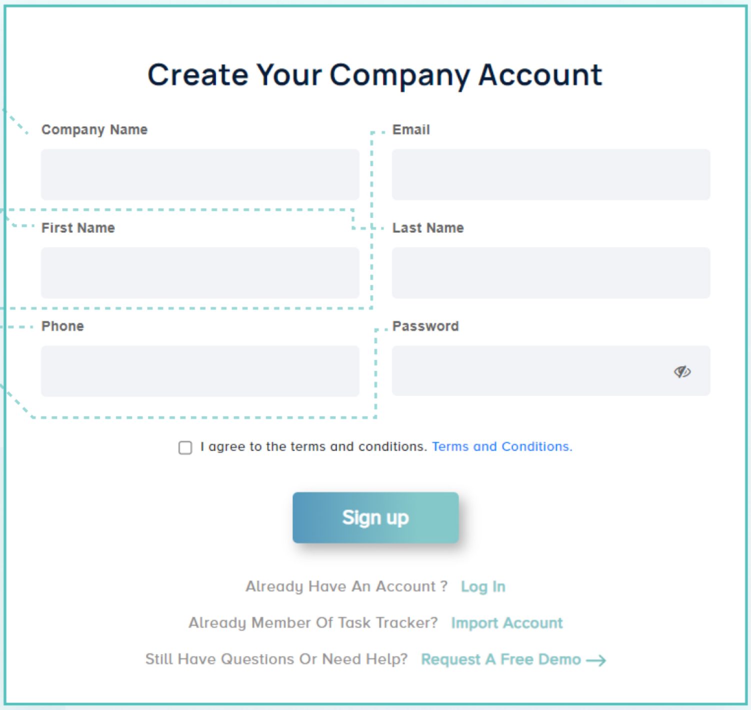
Sign Up / Log In

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:

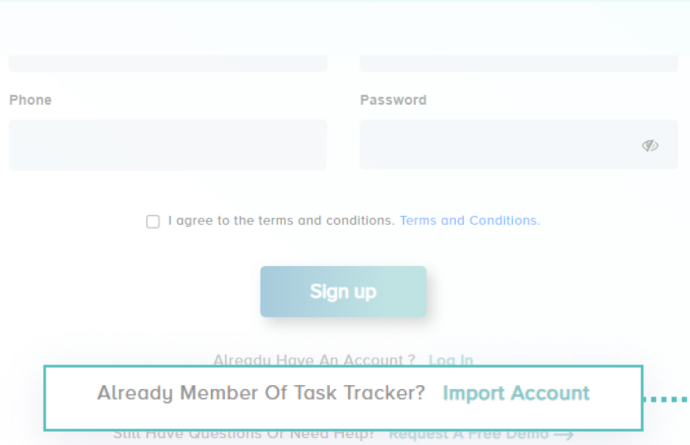
- Company name
- First name
- Last name
- E-mail
- Phone number
- Set up a password



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"

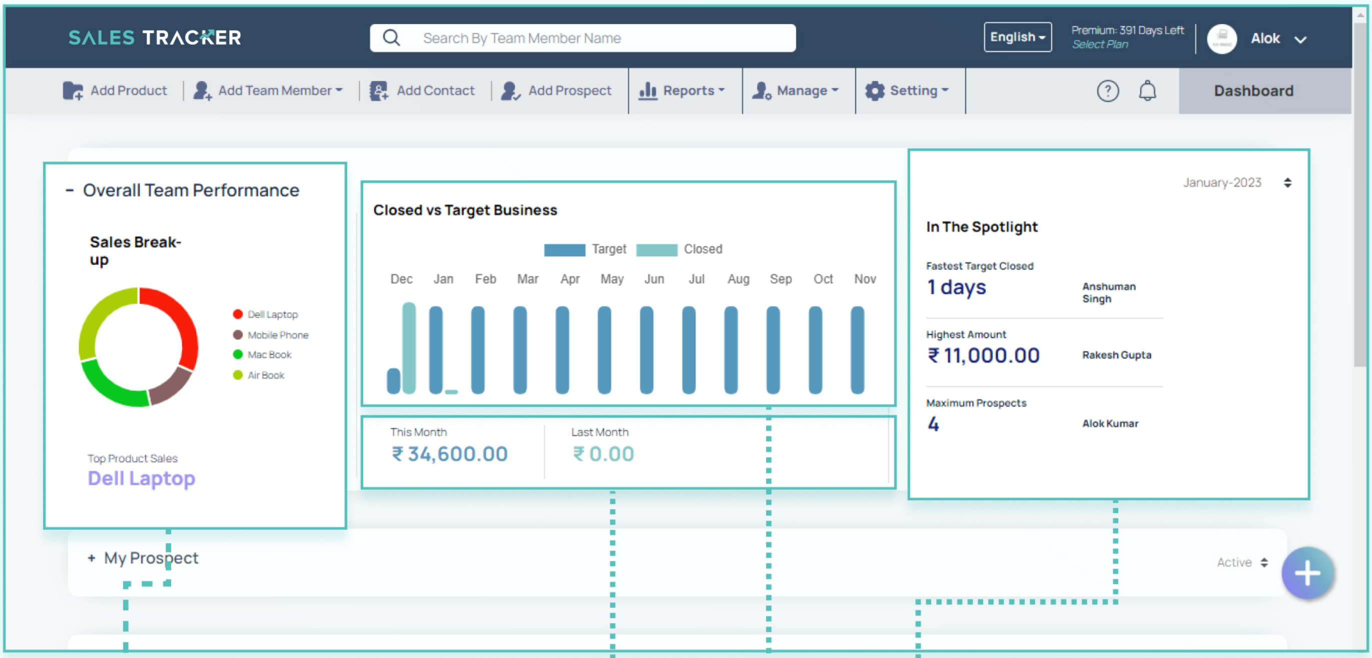


After that fill in your, Task Tracker credentials to log in to your Sales Tracker account.

Dashboard

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

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



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

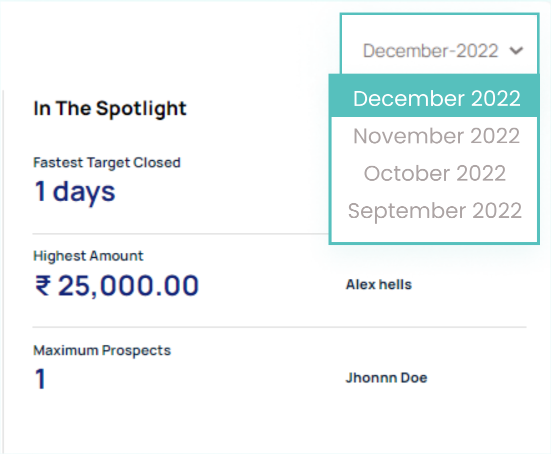
At the bottom, the **sales amount** would be displayed.

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

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

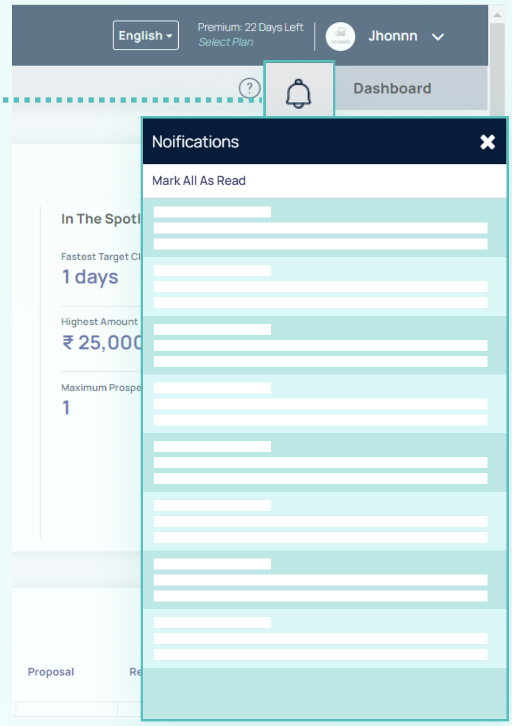
Here you can see:

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



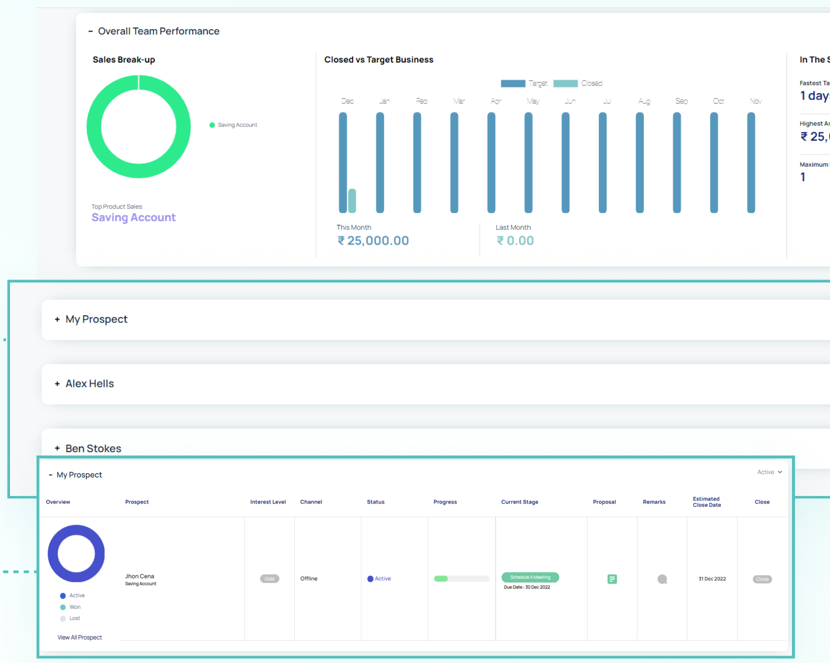
From the drop-down , select the **month** for which you want to see the Spotlight data.

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

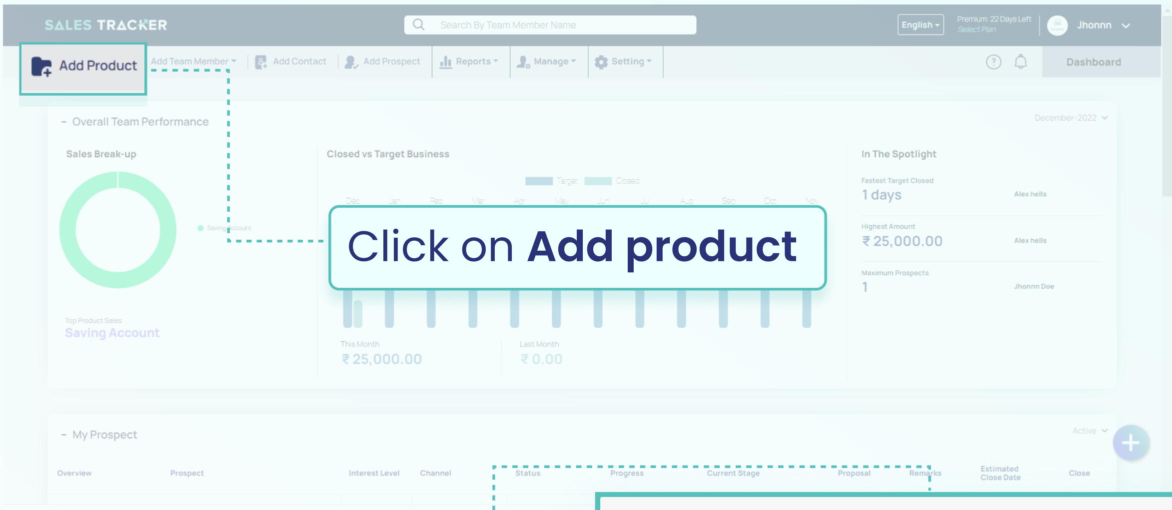


In the bottom section, you can see All the **prospects** assigned to you and other team members with all the details.

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



Add Product



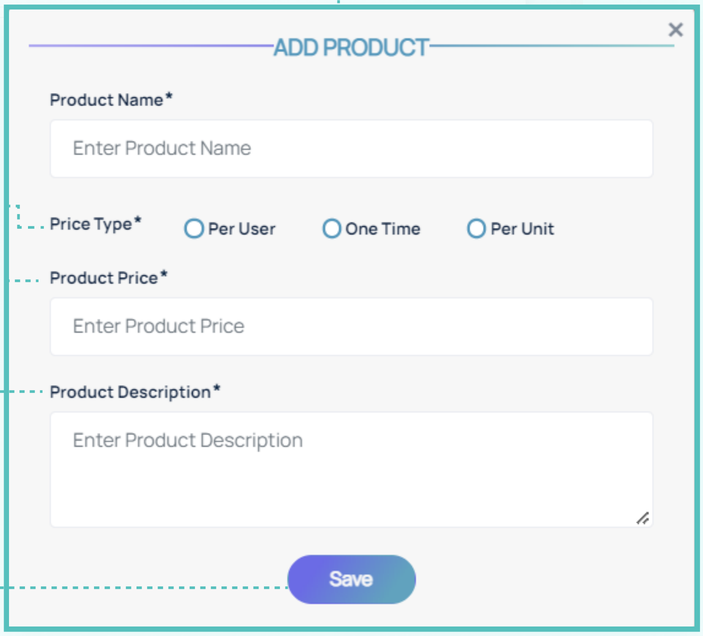
Add the **product** that you sell.

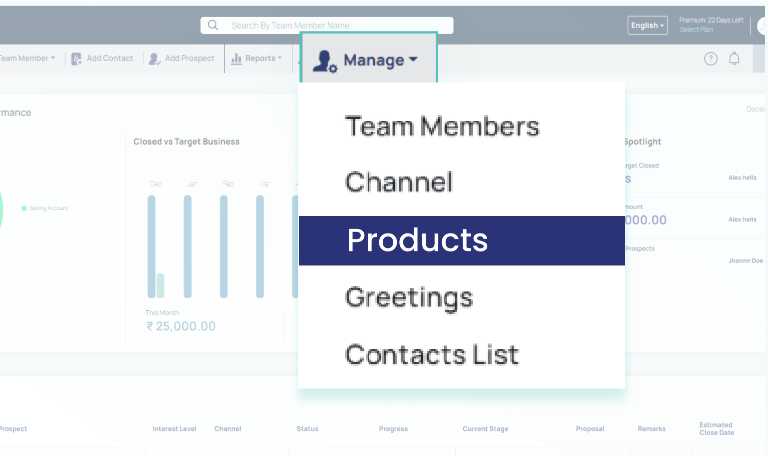
Fill in the details like **product name**, and **price type** that is, **per user**, **one time**, **per unit.**

Enter **product price.**

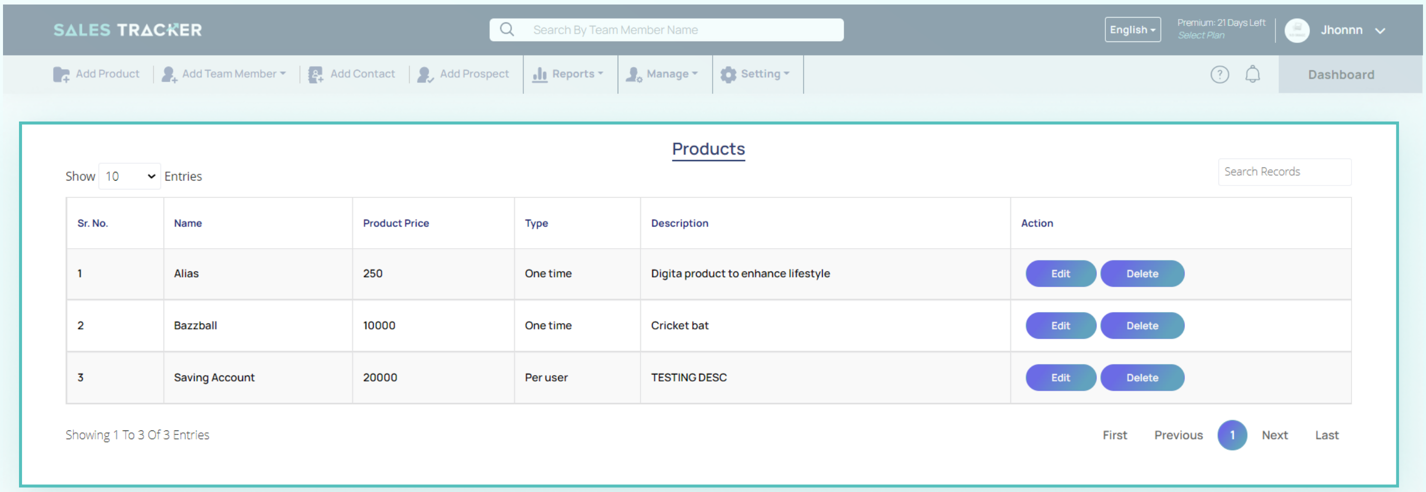
Add **product description.**

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





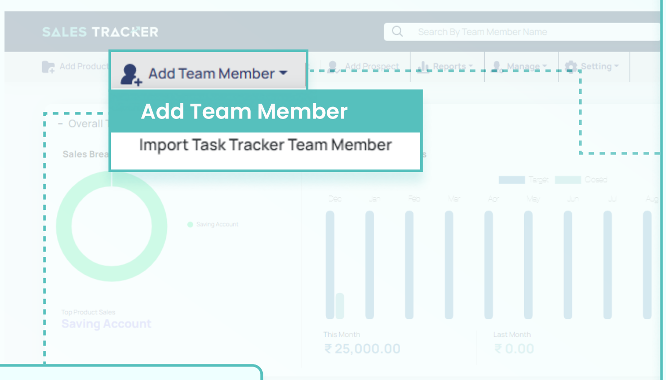
Click on **Manage -> Products** to see all the products that are added.



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

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

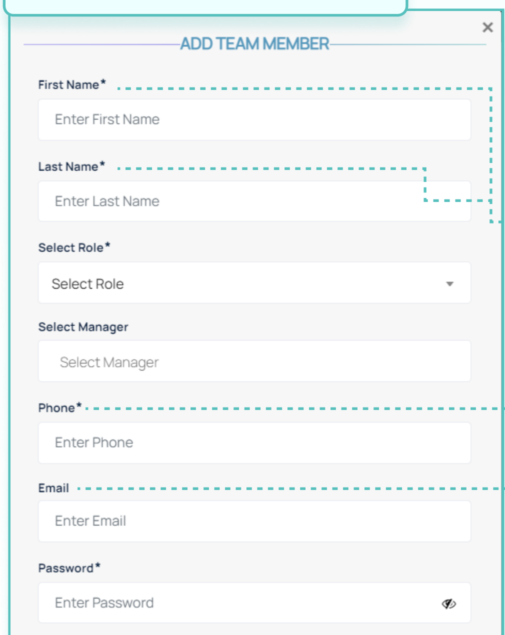
Add Team Member



Under Add team member there are two options :

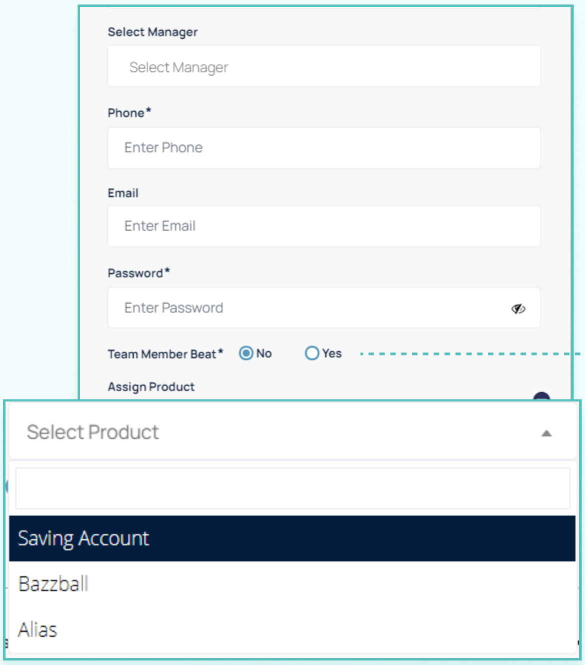
- **Add team member**
- **Import Task Tracker Team Member**

Add team member

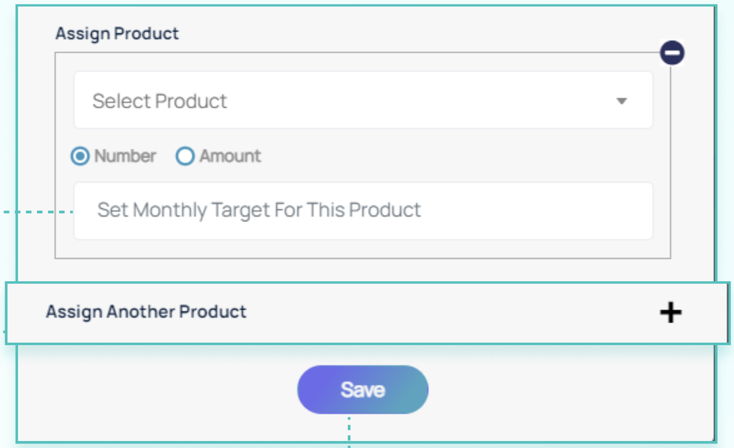


Add details for a new member to be added. Details to be added are:

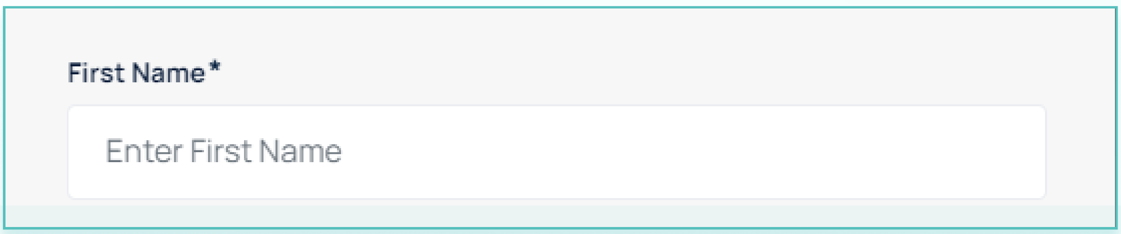
- Fill in **First Name & Last Name**
- Fill in the **phone number.**
- Email (optional).
- Set a password (which the user can change later on).



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

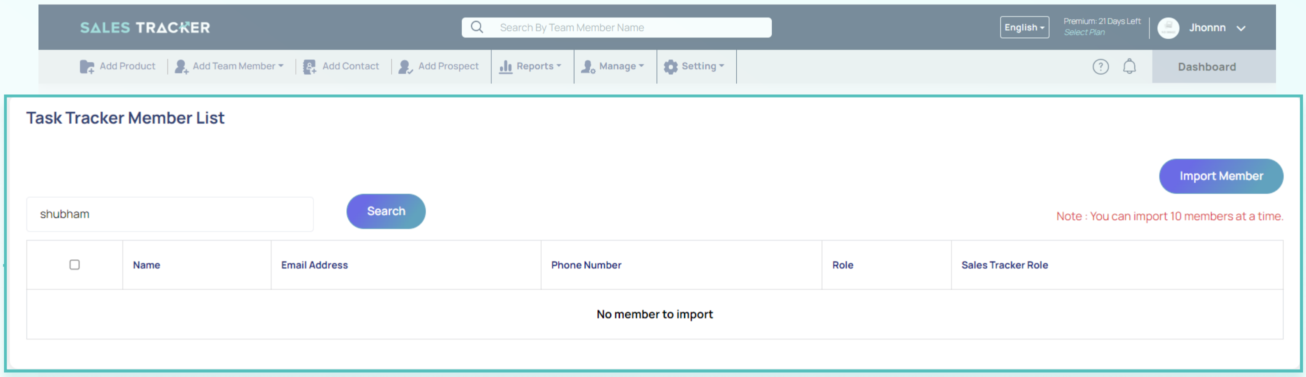


- In the box down here you can add the **sales target** for the member.
- By clicking on **Assign Another Product** you can assign more the one product to the team member.
- Click on **save**



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

Import Task Tracker Team Member

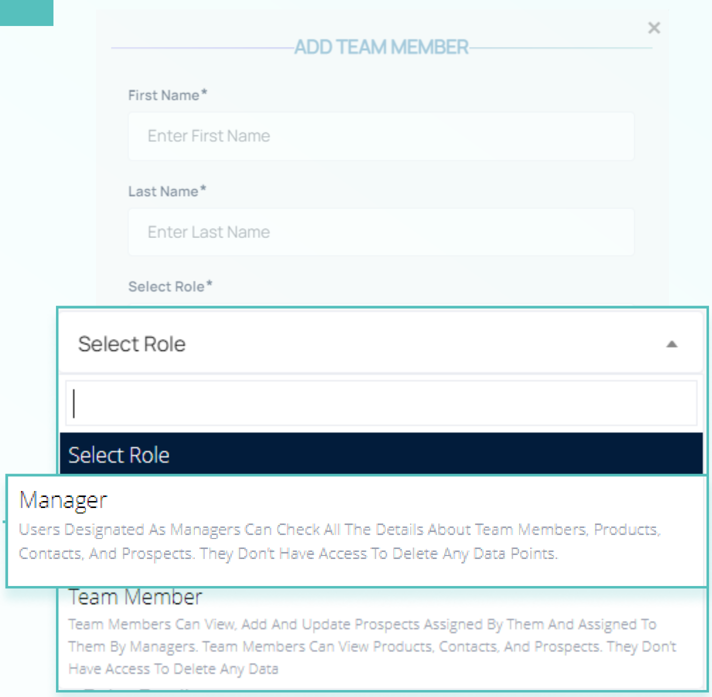


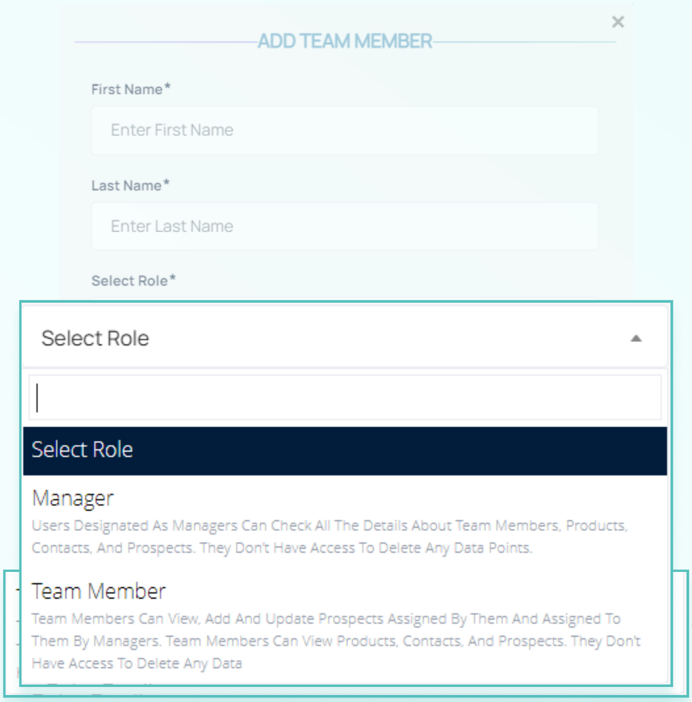
Import Task Tracker Team Member is an option that allows you to import members of your team that you added to the **Task Tracker**. For this, you should **log in with the Task Tracker account.**

Assigning roles

Choose a role for a new member:

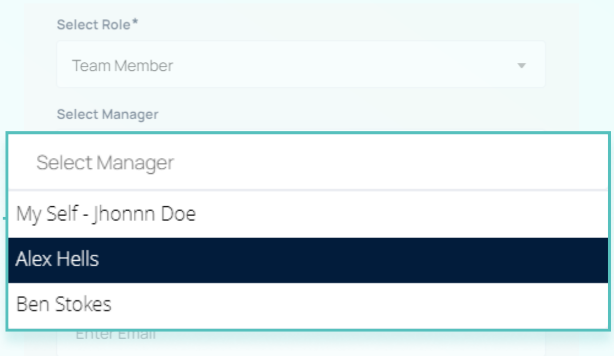
- **Manager** : Who have the access to all the team member, product, contact, and prospect. They don't have access to delete any data point.



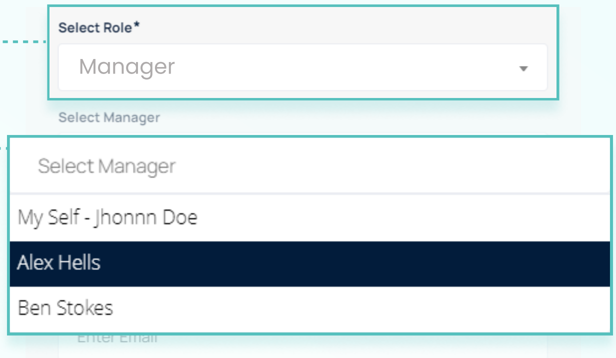


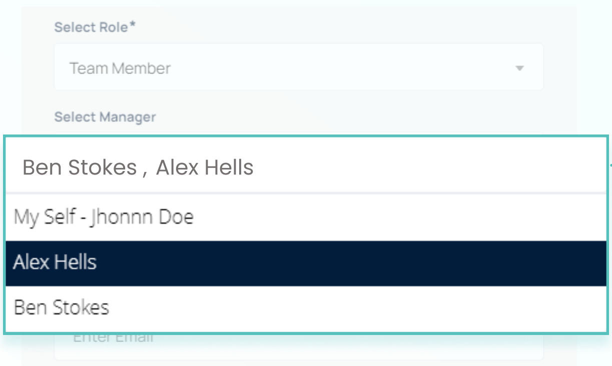
Team Member : They can check all products, contacts, prospects, etc assigned by them or assigned to them by the managers, but not of any other team member. Like Managers, they don't have access to delete any data point.

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.

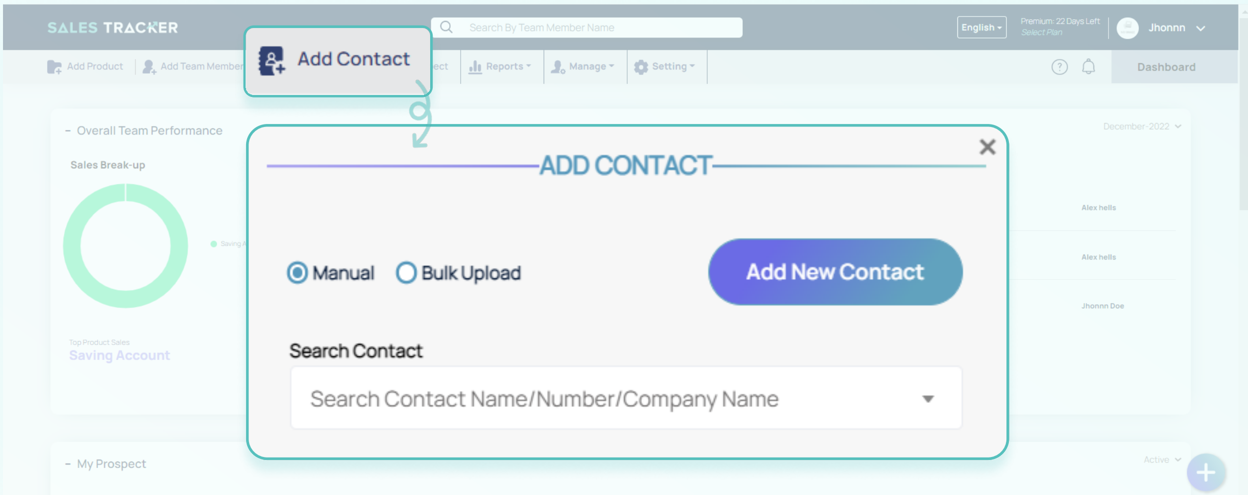




You can assign multiple Managers for notification.

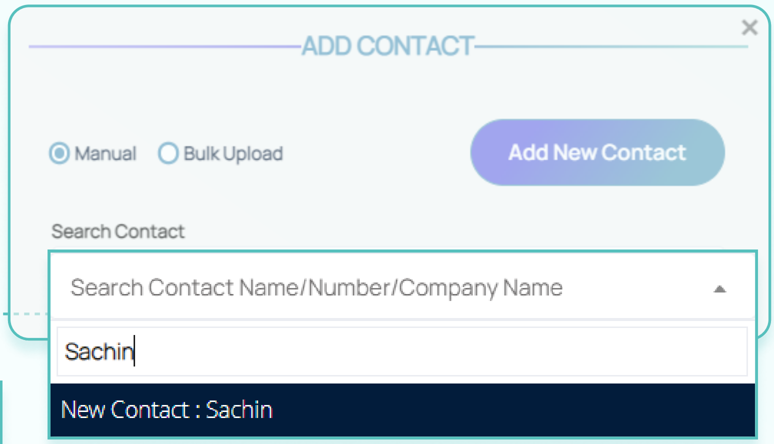
Add New Contacts

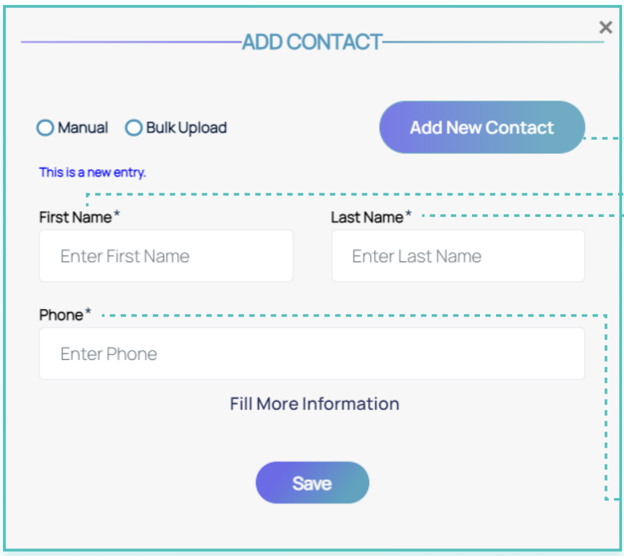
Click on **Add Contacts** you can add new contact details



Here you would find two options: **Manual** **Bulk Upload**

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

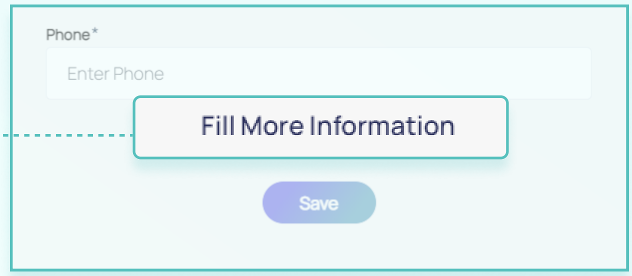


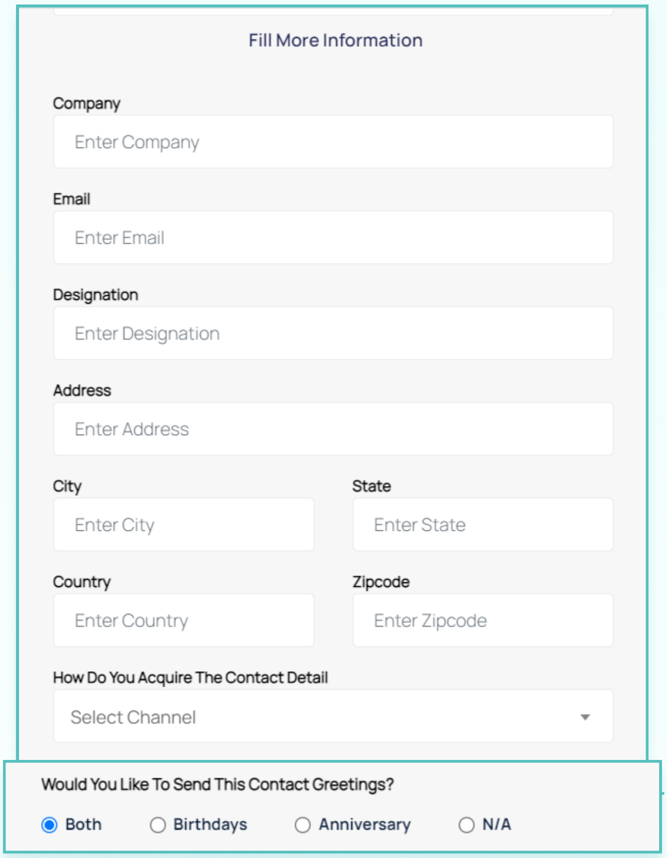


- By clicking on **Add New Contact.**
- You can add contacts manually one by one.
  - Fill in the **First name.**
  - **Last name.**
  - **Phone number.**

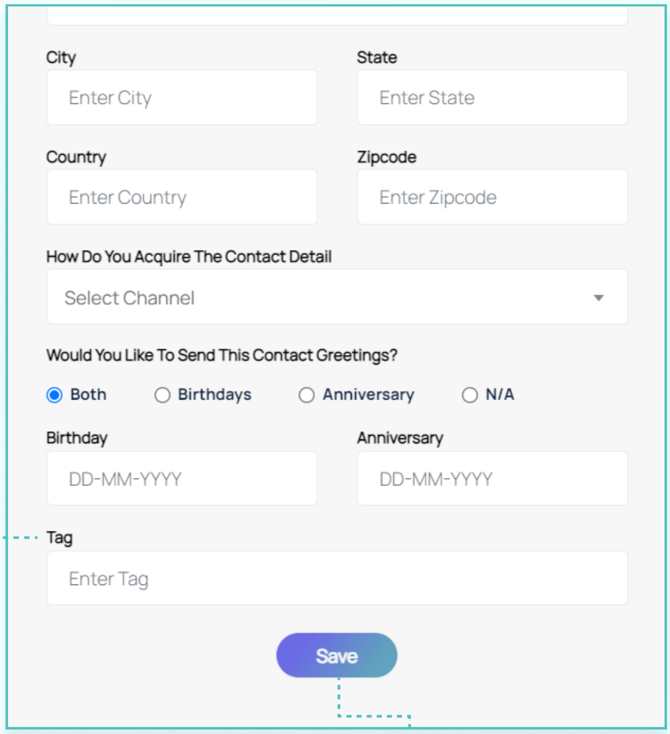
These are basic and essential details required to add a contact.

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





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.

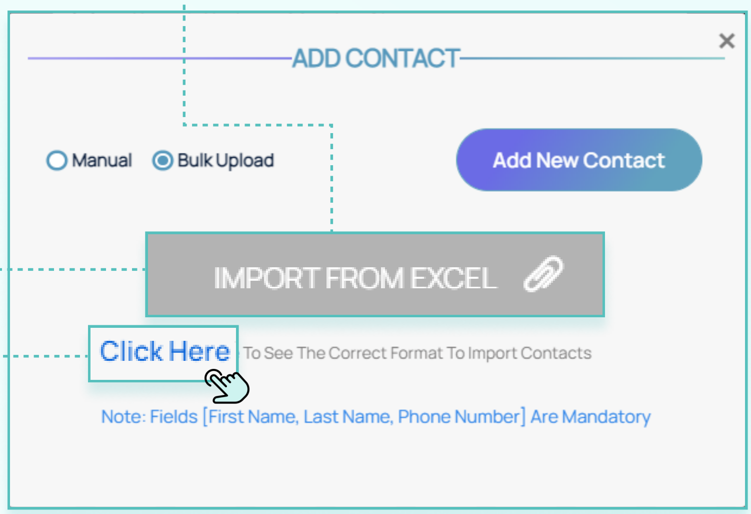


Also, you can **enter a Tag** (say potential lead, an existing client, etc).

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.

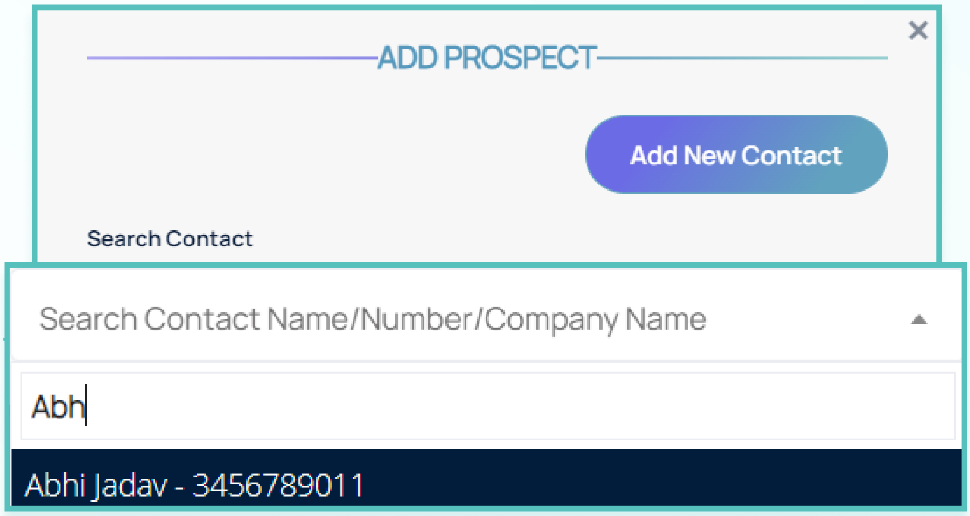
- Manual
- **Bulk Upload**



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



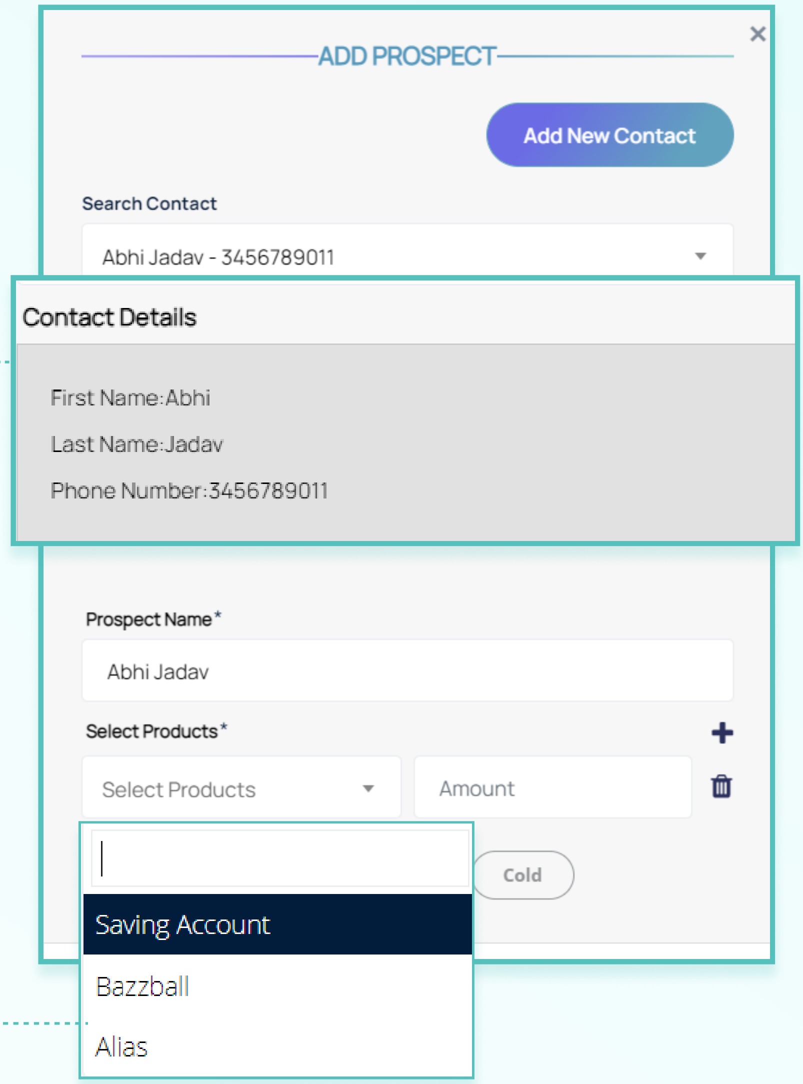
- Click on **Search Contact**.

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

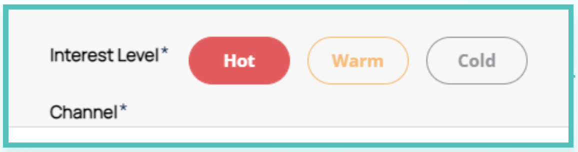
The details of the contact would appear.

Select the **Product.**

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

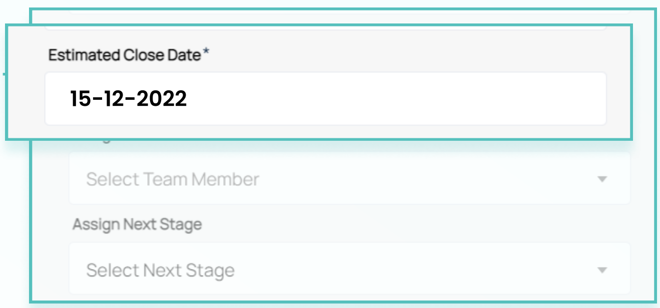


Next select the interest level of the prospect: **Hot**, **warm**, **cold.**

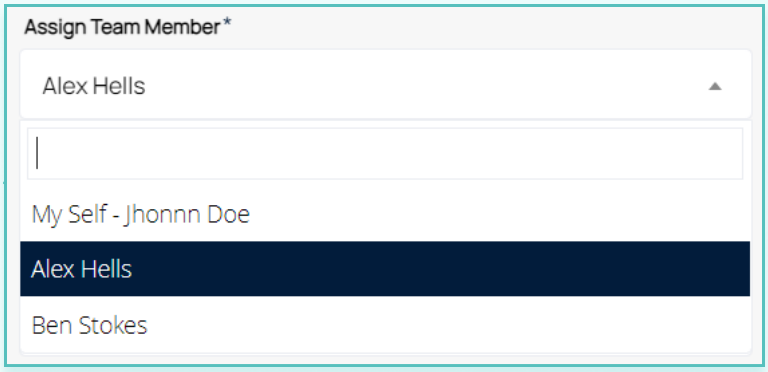


From **Channel,** you can select the channel from which you have got the contact/client, say online, offline, or partner.

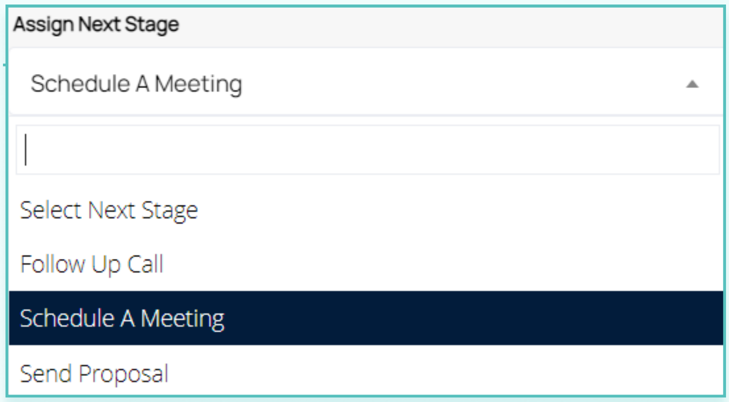
Choose the **estimated close date** for the prospect.



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



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

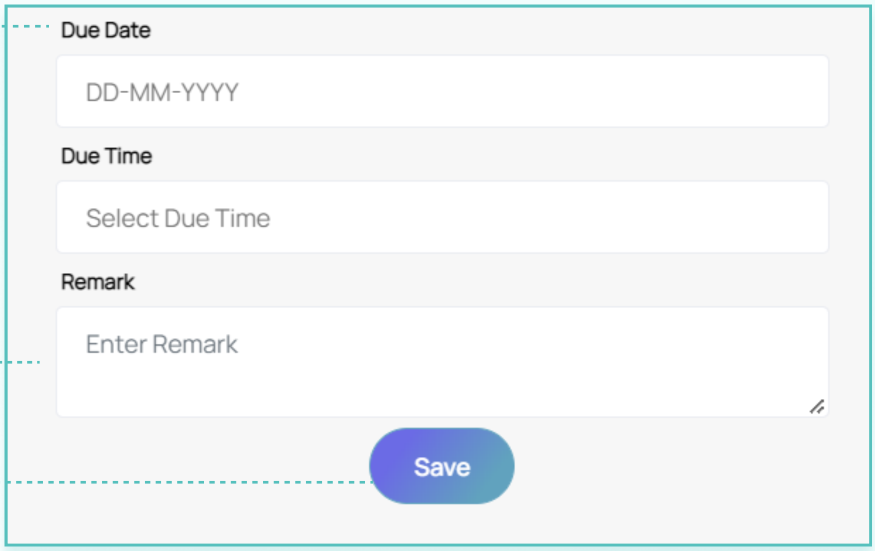


Pick a **due date.**

Enter **remarks** (if any).

Click on **save.**

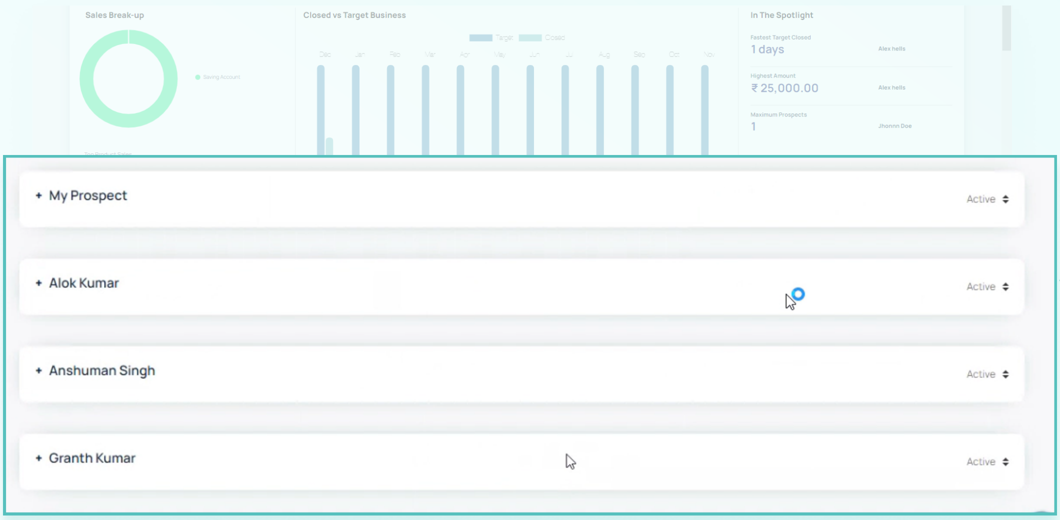
The **prospect** would be assigned to the team member.



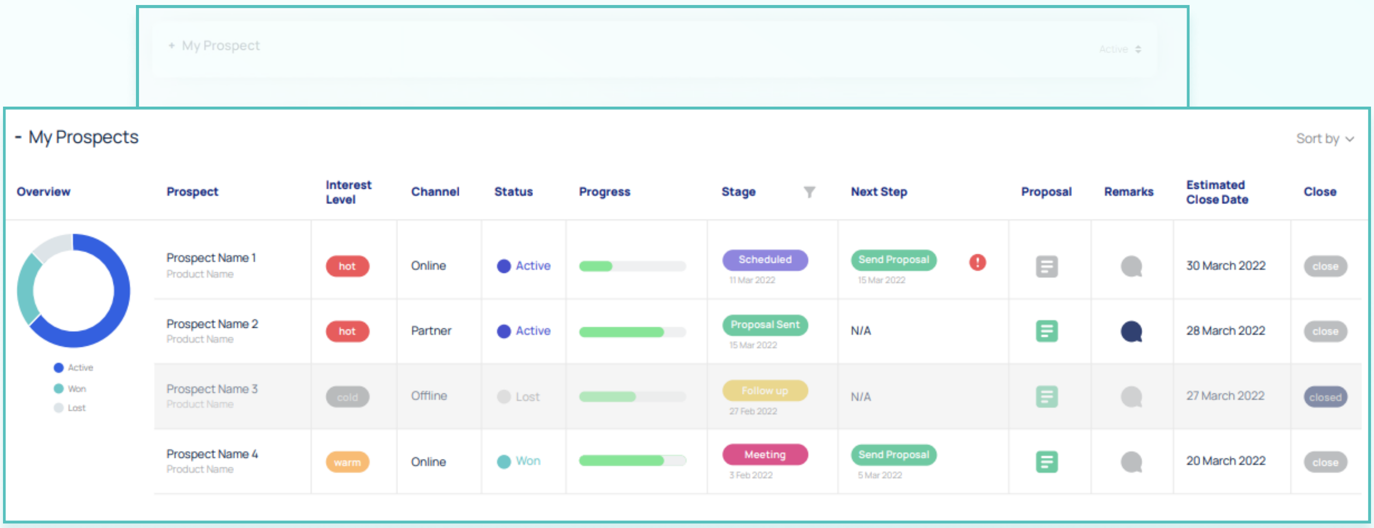
You can also add a prospect from the **plus sign** at the bottom right-hand corner of the screen

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

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

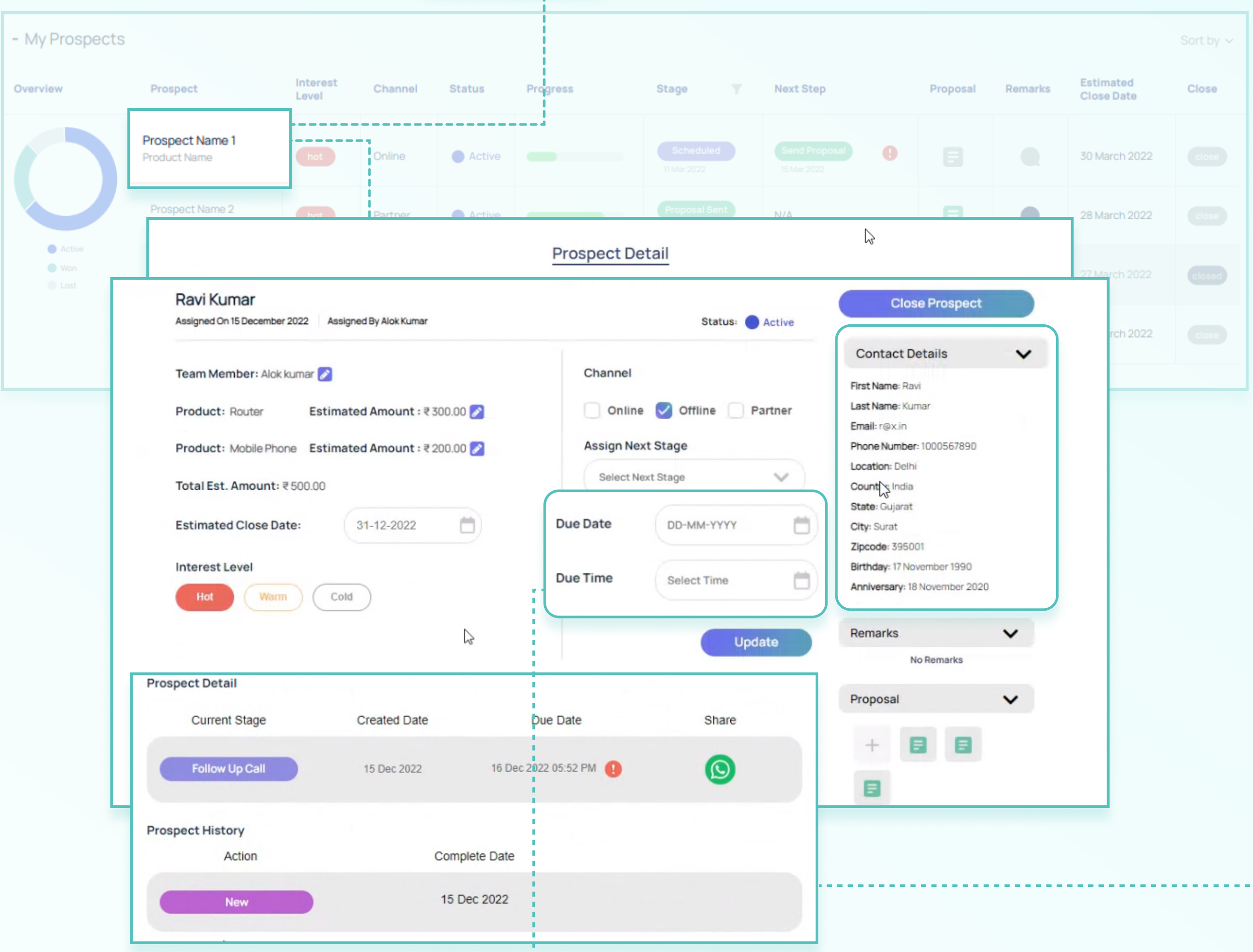


Here you can select the team member.Once you click on the team member's name.



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.**

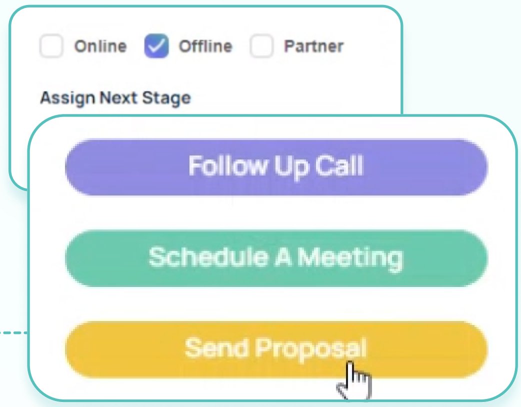


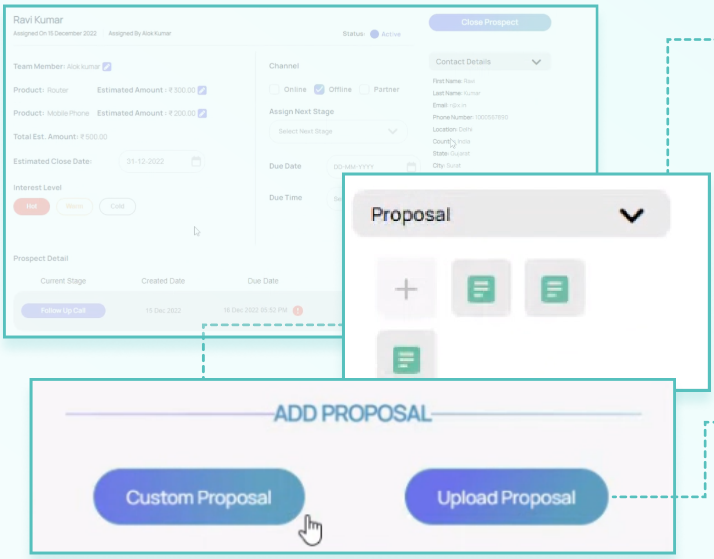
Here all the **details** related to **particular prospects** would be visible.

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.

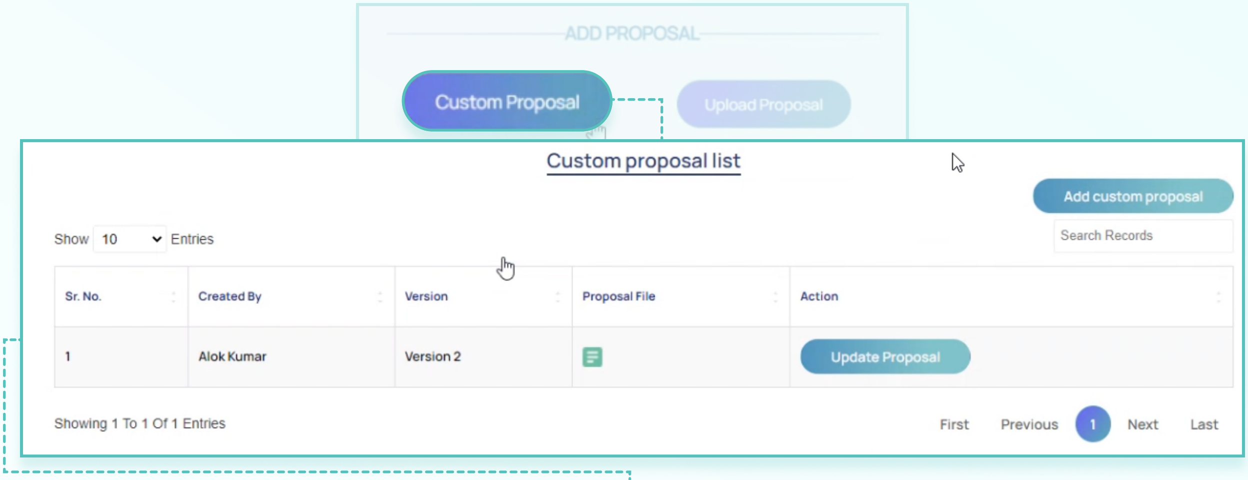
The agents can easily manage the prospect from here and can make changes like changing the stages from **follow-up calls, setting up meetings & sending proposals.**



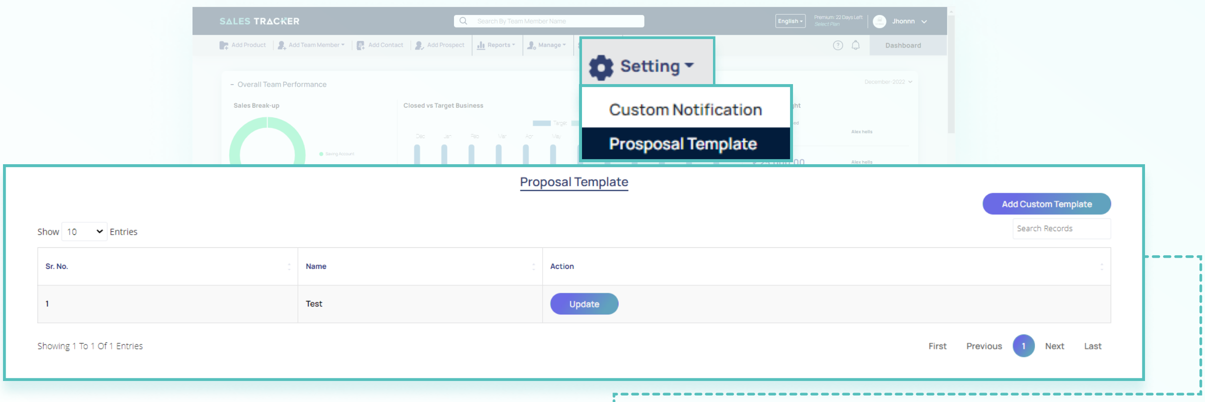


To send a proposal, you need to click on the plus sign and it gives you two options **Custom Proposal or Upload Proposal.**

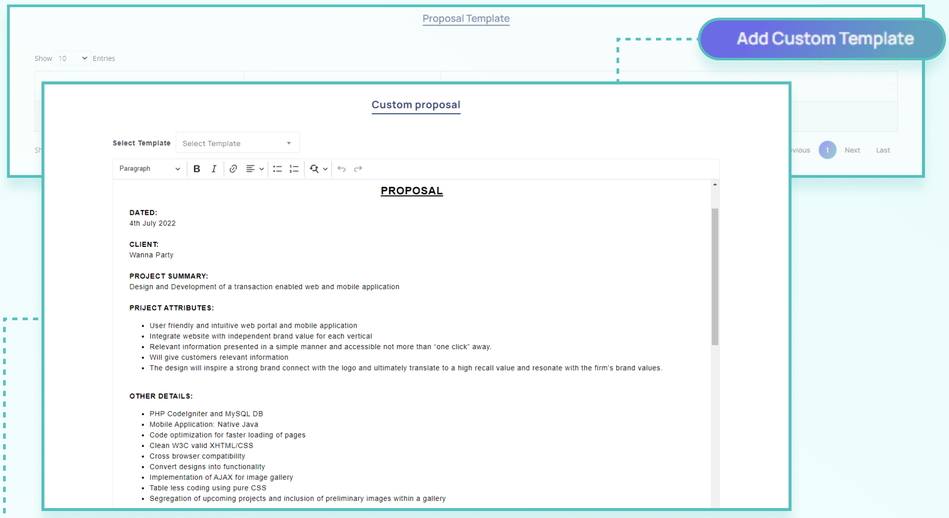
Clicking on **Upload Proposal** you can simply upload the proposal file from your computer.



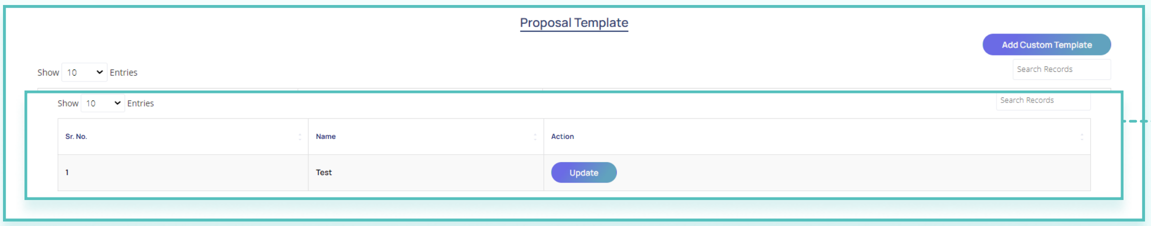
Whereas clicking on the **Custom Proposal** gives you an option of sending the proposal in a custom template.



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



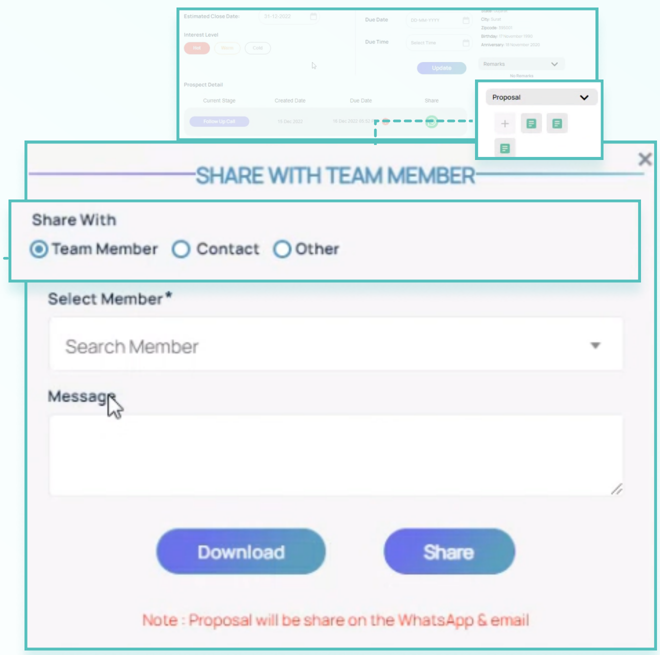
There is a **default template** already there in the Sales Tracker. For your custom template, you can add click on **Add Custom Template** and create a new template as per your needs.

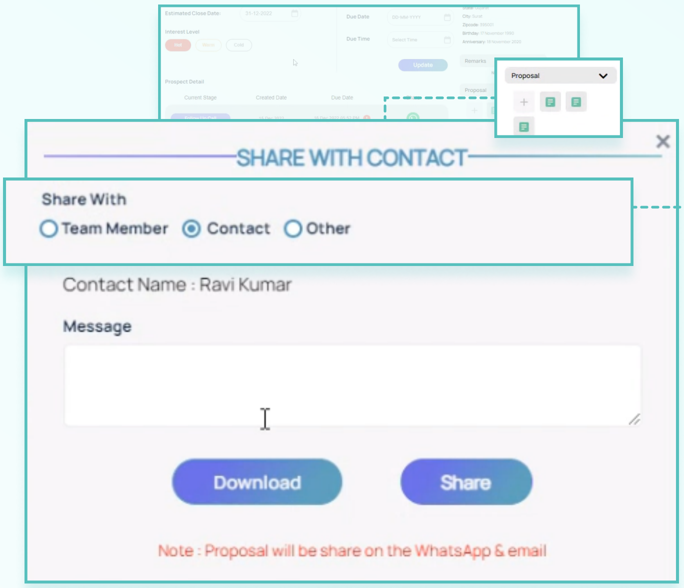


Under the proposal template, you can see all the **templates** that you have created. This comes in handy when you have to send multiple proposals to the client say the initial proposals and then the final proposal for closing the deal.

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

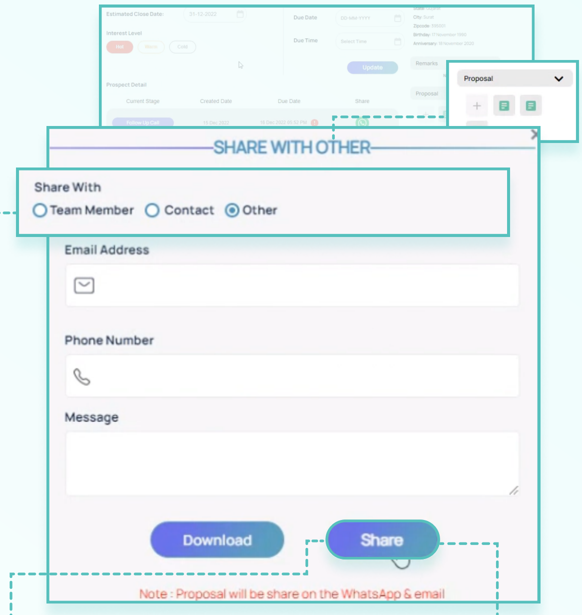
You can select a **team member** if you want to share a proposal with any of your team members.



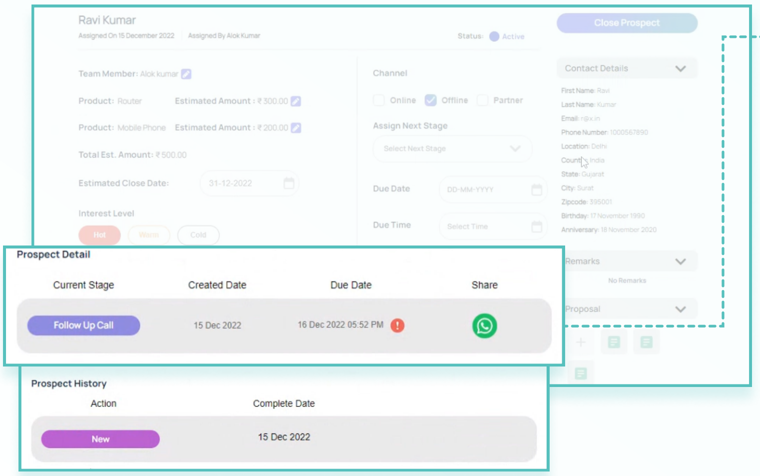


The next option is to share the **proposal with a contact.** You can select a contact name, and add a message, the message can be any information that you want to pass to the person with whom the prospect would be shared.

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.

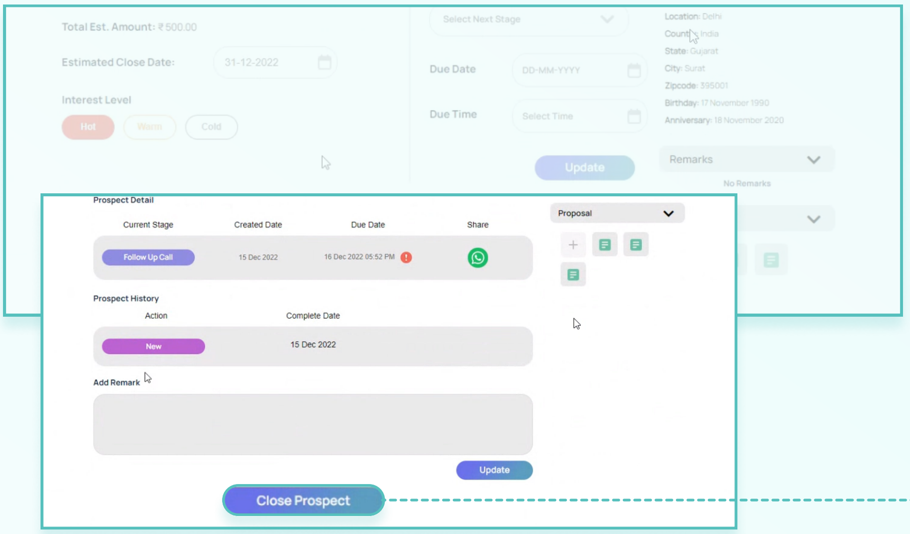


In all cases, a message on **Whatsapp** and **G-Mail** would be sent to the person with whom the prospect is shared.



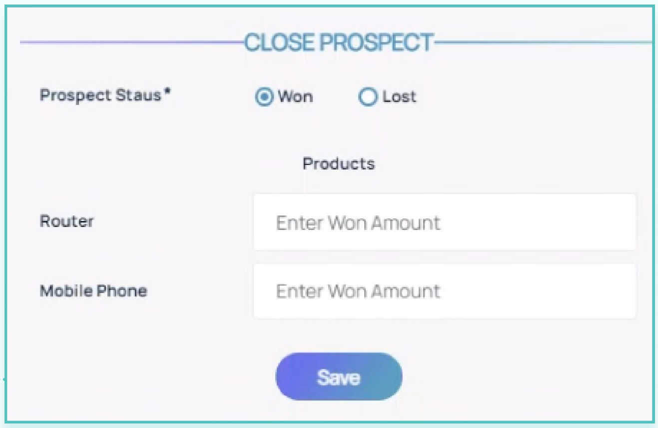
You can also check all the proposal initial as well as revised ones that have been shared with the client.

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

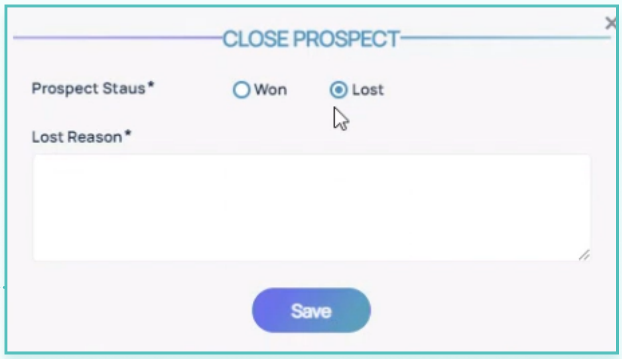


For closing a prospect you should click on the **Close Prospect.**

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.



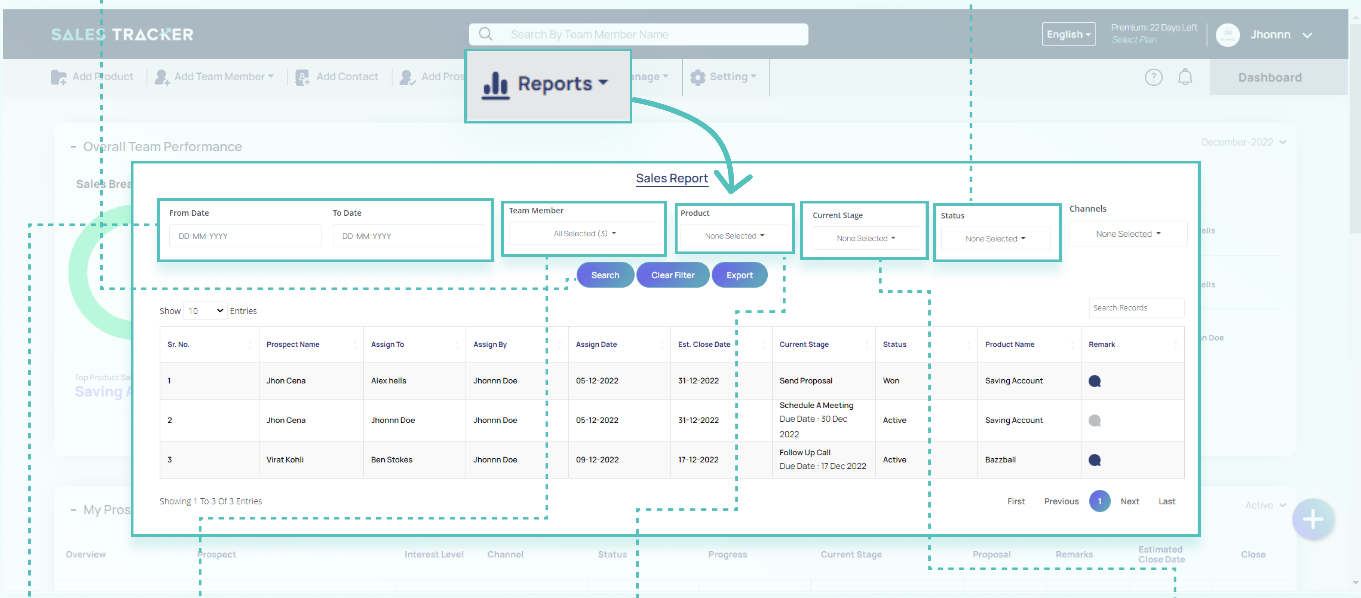
Click on **save** and the prospect would be closed.

Reports

Sales Report

- 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).*

- Click on **Search**

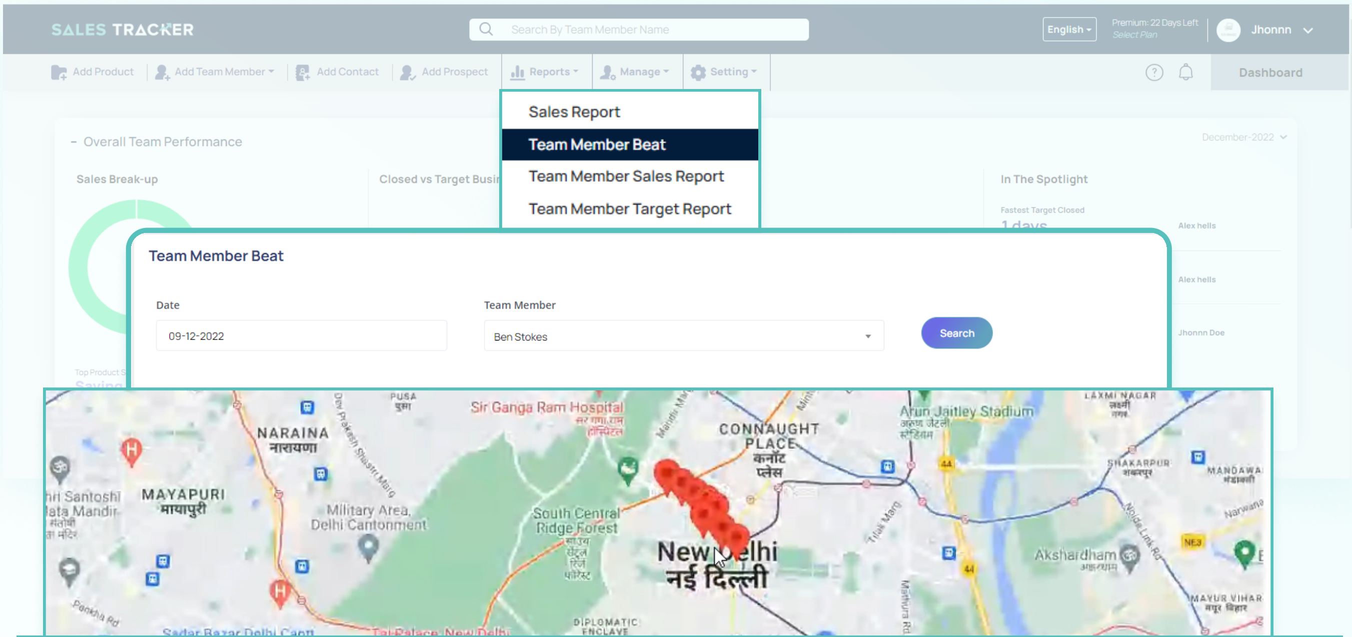


- Select the **date range.**
- Pick Products/product.
- Select **Team members/ Team member.**
- Select a **Current stage (follow-up, call, schedule a meeting, etc).**

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.

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

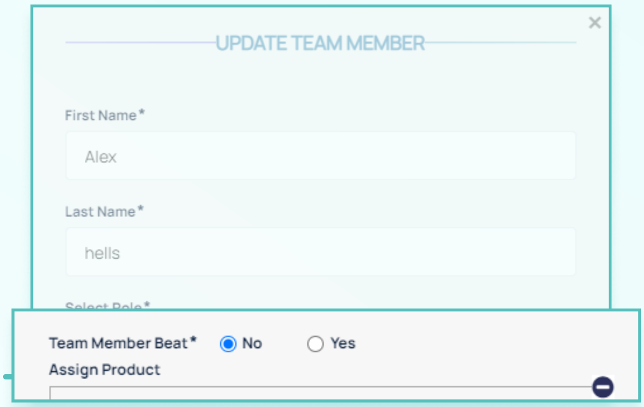
Team Member Beat



Location list

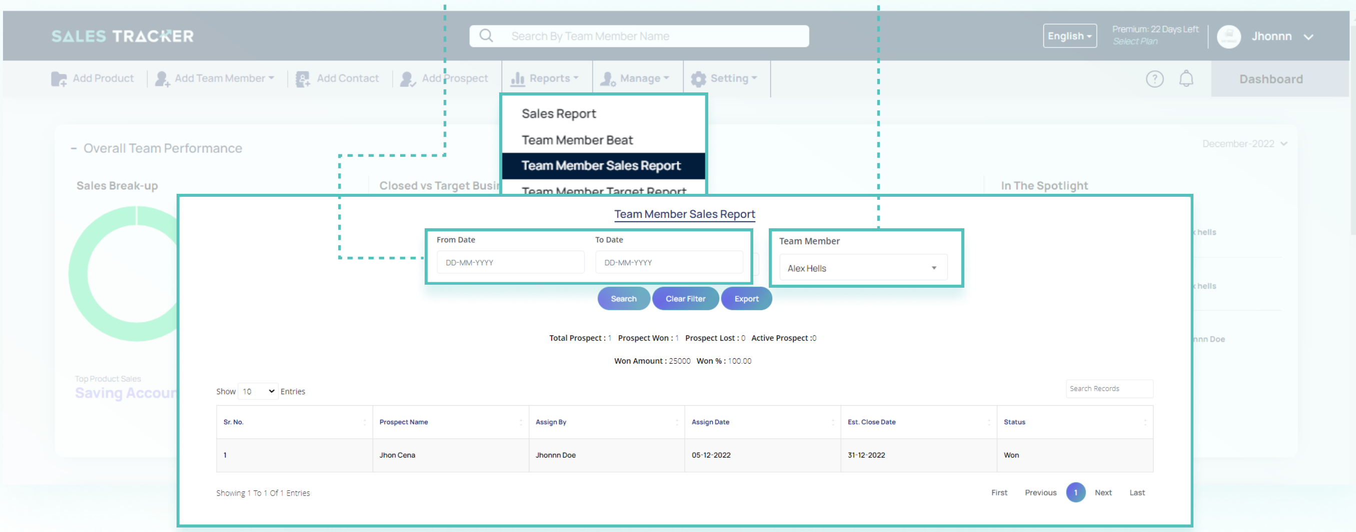
Sr. No.	Address	City	State	Zipcode	Time
1	Talkatora Road, Rakab Ganj, New Delhi - 110004, Delhi, India	New Delhi	Delhi	110001	11:04 AM
2	Talkatora Road, Rakab Ganj, New Delhi - 110004, Delhi, India	New Delhi	Delhi	110001	11:04 AM
3	Gurudwara Rakab Ganj, Talkatora Road, Rakab Ganj, New Delhi - 110004, 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.

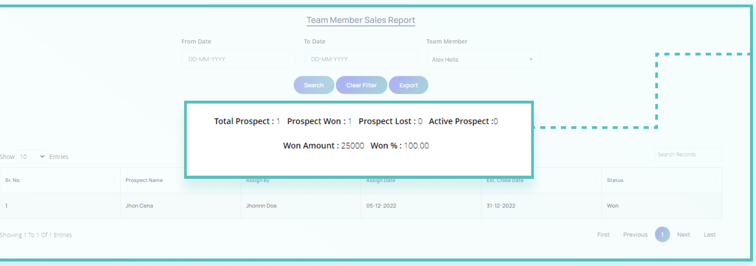


Team Member Sales Report

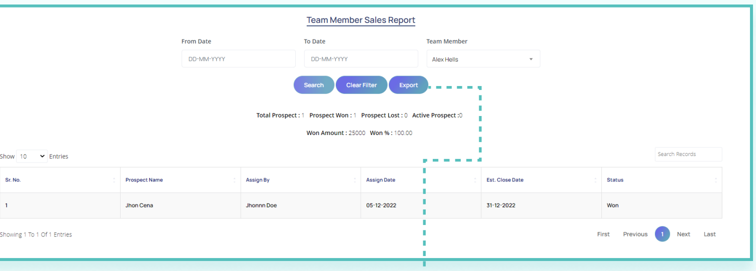
You can see each **team member's sales report** by selecting a **date range** here.



Say for example for a specific month of 30 days.

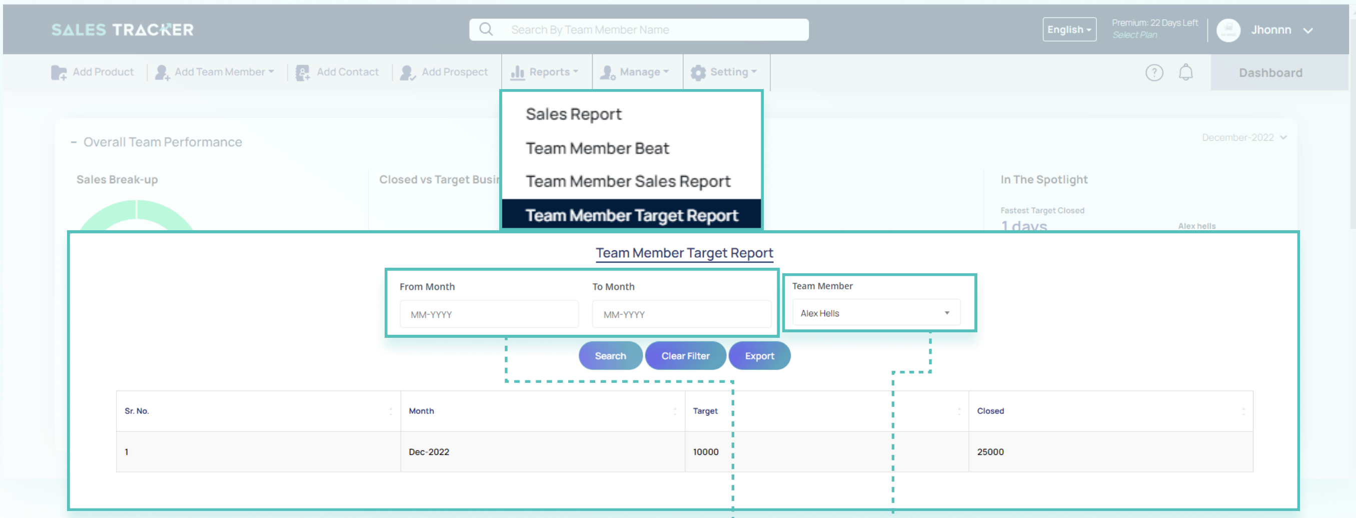


- The following details are visible on the sales report :
  - Total Prospect
  - Prospect Won
  - Prospect Lost
  - Active Prospect
  - Won Amount
  - Won %



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

Team Member Target Report

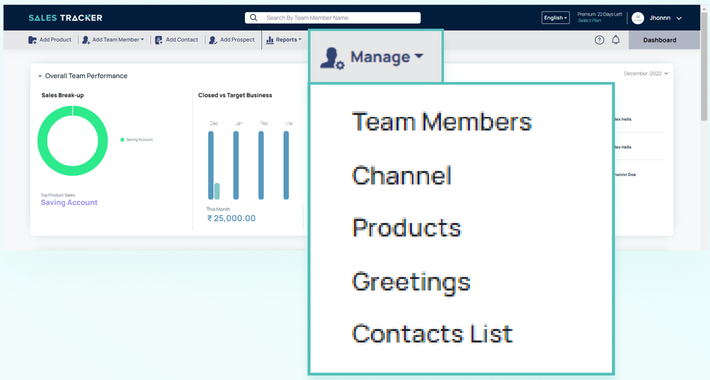


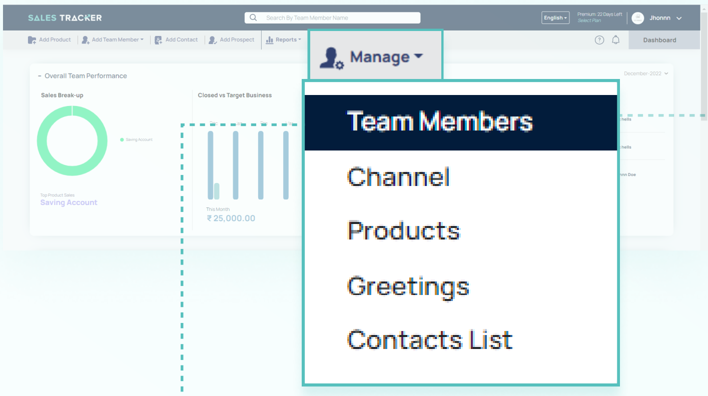
Under this section, you can see the **target report of sales** for the individual member for a **range of months** and can download the same in Excel format by clicking on Export.

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

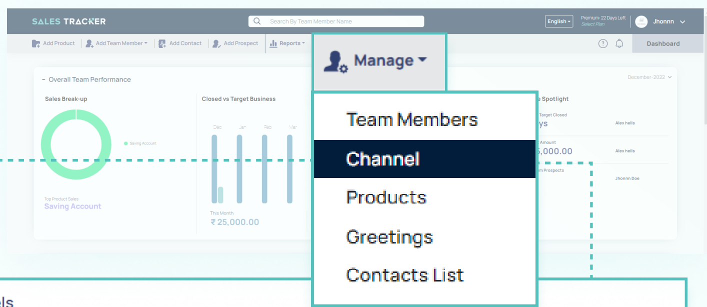
Search Records

Name	Email	Phone	Action
Alex hells		1235689536	Update Suspend Delete
Ben Stokes		9897979797	Update Suspend Delete

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

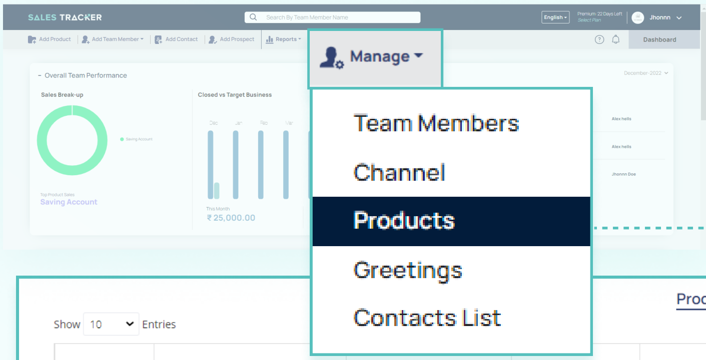
Add Channel

Show 10 Entries

Search Records

Sr. No.	Channel Name	Action
1	Offline	Edit Delete
2	Online	Edit Delete

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



Products

Show 10 Entries

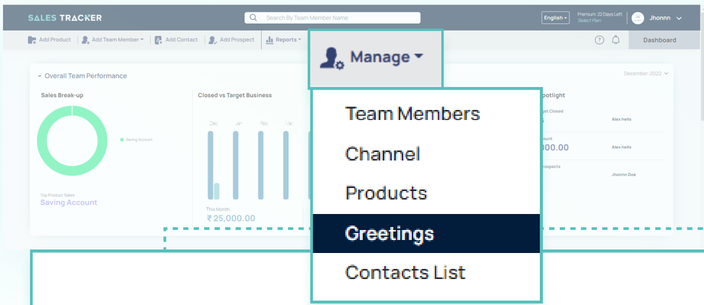
Search Records

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

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.



Greetings

Add Greeting

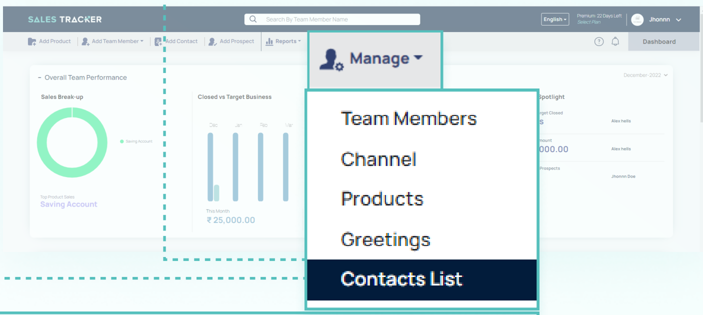
Show 10 Entries

Search Records

Type	Message	Action
Birthday Greeting	happy Birthday	Edit Delete

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

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



Contacts List

Export

Show 10 Entries

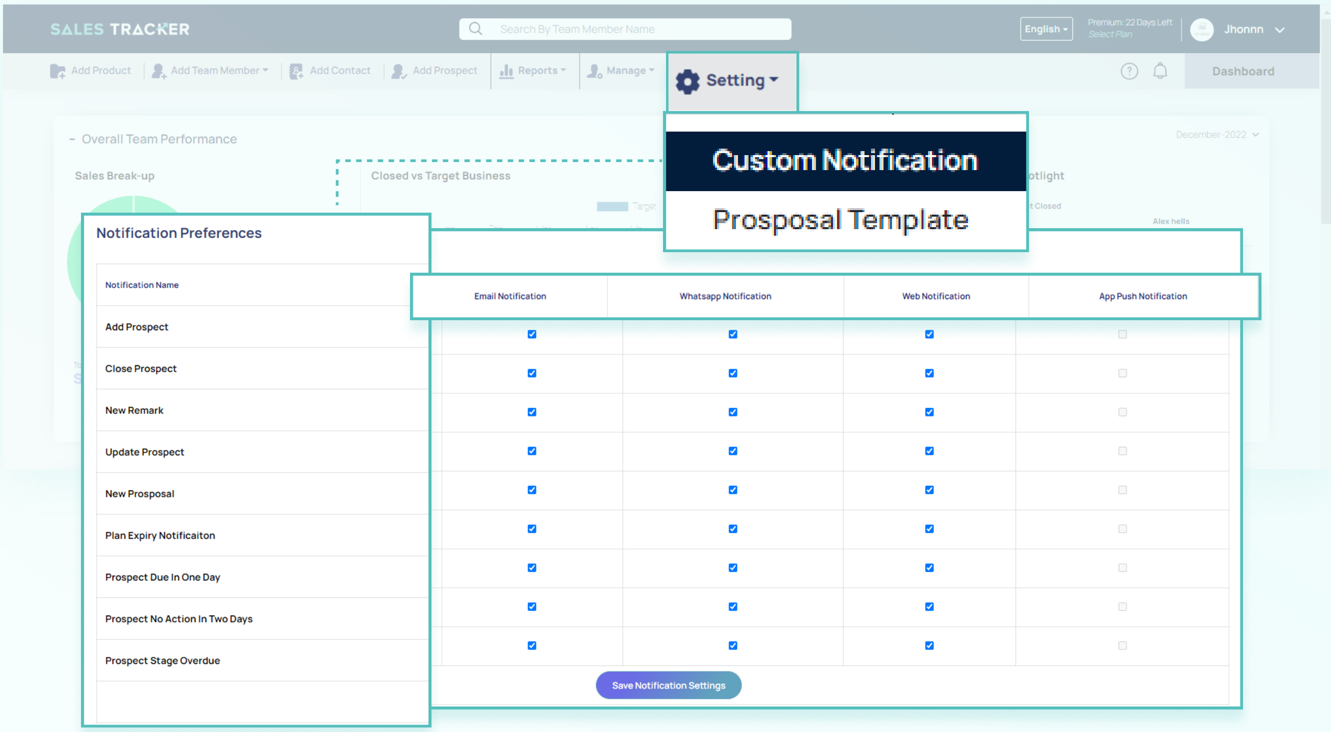
Search Records

Sr. No.	Name	Phone	Company Name	Tag	Action
1	Abhi Jadav	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 — First Previous 1 Next Last

Settings

Click on the **Custom Notification.**



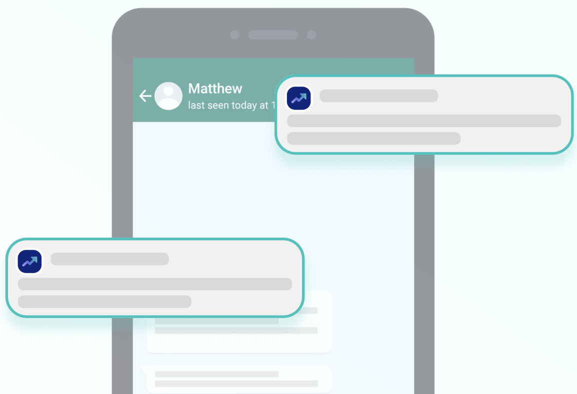
Here you can switch on or off notifications for :

- **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

support@tasktracker.in

+91 9319185740