

SourceTap CRM Getting Started

1. SourceTap CRM Getting Started

This document is intended to give you an introduction to the Lead Tracking System, and to give you enough information to test drive the demo system. The Lead Tracking System is a component of SourceTap's CRM application. The demo shows the standard functionality of the system in a typical implementation. The system is highly configurable so that it can be tailored to meet additional requirements in a very short time frame.

The screenshot displays the SourceTap CRM login interface. At the top, a blue navigation bar contains the SourceTap logo, the text 'Sales Force Automation', and several dropdown menus. Below the navigation bar, a large graphic shows three business professionals (two men and one woman) standing in front of a large document titled 'ALL COMPANIES'. To the right of this graphic is a 'Registered User Login' section with a key icon. It includes two input fields for 'User ID' and 'Password', and a 'Login' button. Below the login fields, there are two lines of text: 'If your company is not registered yet, [click here to set up a new company.](#)' and 'For instructions on how to use this system, [click here to download the GettingStarted Guide.](#)'

Login Screen