

BUSINESS SOLUTIONS BY MEDI-QR

Business Tracker and Prospect Finder

User Manual

Business Tracker v1.1
Professional Edition

Find prospects
Organize leads
Manage follow-ups

Medi-QR, LLC

User manual
October 2026

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Business Tracker v1.1 Professional Edition
Business Solutions by Medi-QR
Illustrated user manual | October 14, 2026

Welcome

Use Business Tracker to organize sales leads, customer information, and follow-up activity. Use Prospect Finder to discover businesses, review their fit, and send selected prospects into Business Tracker.

This guide takes you through setup, daily lead management, prospect searching, contact review, importing, search credits, and basic troubleshooting. The desktop workflow is intended for Windows laptop and desktop computers.

Quick start

1. Install Business Tracker and begin the two-week trial, or activate it using your purchased license information.

2. Open Business Tracker and become familiar with Leads and Customers.

3. Open Leads in Business Tracker. Click the pill-shaped Find Prospects button at the top of the Leads page to open Prospect Finder. Describe the businesses you want and run a search.

4. Review the results and verify useful contact information.

5. Send selected prospects to Business Tracker, review each imported lead, and save it.

6. Set a next follow-up date and update the lead as the opportunity progresses.

Guide contents

Step	Learning topic
1	Installation activation and company settings
2	Business Tracker workspace leads customers and reports
3	Backup restore and application information
4	Search with Prospect Finder
5	Research prospect contacts
6	Import and review candidates in Business Tracker
7	Search credits and daily care
8	Troubleshooting and support

Installation and activation

Before you begin

Business Tracker includes a two-week trial version so you can try the software before purchasing. Have your installer available and keep any purchase and license records in a secure place. Prospect searching and online activation require an internet connection.

Use the installer supplied by Business Solutions by Medi-QR. If your browser blocks a download, stop and contact support with the exact warning. A digital signature identifies a publisher; it is not a reason to disregard a security warning.

Install Business Tracker

1. Close any running Business Tracker and Prospect Finder sessions before installing or updating. Back up existing business data before an update.

2. Open the approved installer and follow the installation prompts.

3. When installation finishes, use the installed Business Tracker shortcut. If the application does not open automatically, launch it from that shortcut.

4. If an activation page appears, follow its prompts using your supplied license information.

5. For a purchased license, confirm that activation succeeds and Professional Edition is shown. If you are trying the software, continue with the two-week trial.

Open your applications

Launch Business Tracker from its installed shortcut. A centered, rounded splash screen displays the Business Tracker logo and remains visible for at least three seconds while startup completes. Open Leads, then click the pill-shaped Find Prospects button at the top to open Prospect Finder. Keep both application tabs open while searching and importing so they work together properly.

These desktop applications use a local browser interface. A browser tab is the working screen; the application must also be running on the computer. An old tab can remain visible after its local application has stopped.

Complete your setup

1. Review Settings and confirm the company information shown in your installation.

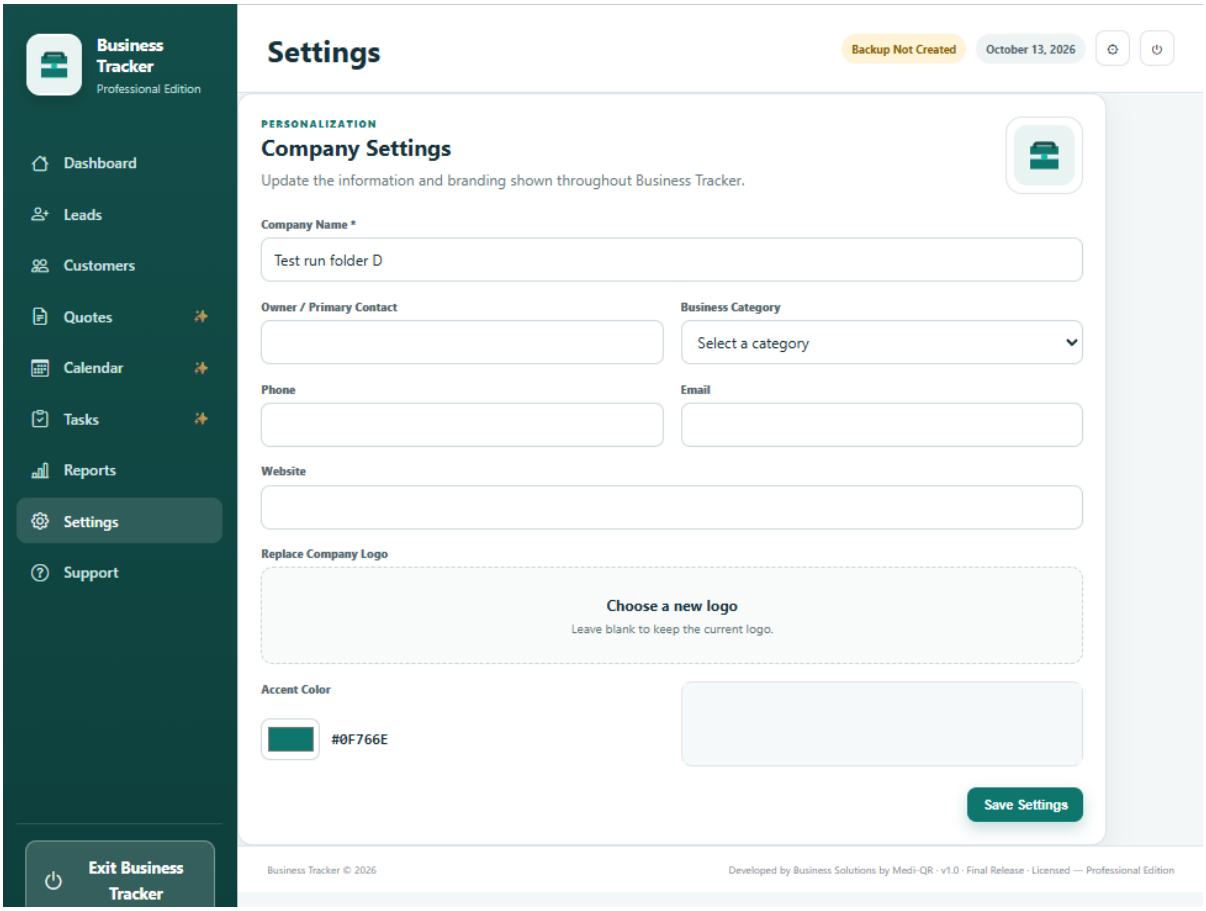
2. Open Leads and review the available fields before creating your first lead.

3. Use a small initial Prospect Finder search to learn the review and import process.

4. Keep a record of your license information, purchase receipts, and backup location.

Personalize company settings

Update company details, logo, and accent color, then click Save Settings. Installation identifiers are omitted from this illustration.



Personalize company settings

Business Tracker workspace

Business Tracker brings the main sales records into one local workspace. Use the navigation to move between the available modules.

Module	Purpose
Dashboard	View the overview shown for your business records.
Leads	Review and maintain sales opportunities and follow-up information.
Customers	Work with customer records.
Reports	View the reports available in your installed edition.
Settings	Review available application and company settings.
Support	Find the application support information.

Features reserved for later versions

Quotes, Calendar, and Tasks are placeholders in Business Tracker v1.1. Do not plan a workflow that depends on these modules until a version with those features is supplied.

Leads and customers

A lead represents a business or contact you are pursuing. A customer record represents an established customer. Keep lead details current so you can identify the next action and avoid repeating research.

For manual entry, open Customers, click + Customer, complete the fields, and click Create Customer. Company is required. To convert a lead, choose Actions then Convert to Customer. Click OK to confirm or Cancel to leave the lead unchanged.

Reports and settings

Reports summarizes active leads, pipeline and weighted values, opportunities, and follow-ups. Monthly forecasts require Expected Close Dates. Sales Forecast adjusts values by probability; Estimated Revenue by Month uses unweighted values. See the illustrated report pages for examples.

Settings contains company name, owner or primary contact, business category, phone, email, website, company logo, and accent color. Click Save Settings after editing. Backup and Restore opens from the backup-status badge at the top of the application.

A useful daily routine

Review New Imports and follow-ups daily. Record contact outcomes, update status and value, set the next follow-up date, and save changes.

Managing leads and follow-ups

Create or edit a lead

1. Open Leads and click + New Lead, or open an existing company record to edit it.

2. Enter the company and contact details. For an imported lead, check the supplied information rather than assuming it is complete.

3. Record the source of the lead and any referral information.

4. Set the sales stage, priority, estimated value, and next follow-up date as appropriate.

5. Add Notes and a Next Action describing your plan. Click Save Changes when editing a lead.

Field reference

Field group	Information to record
Business	Company, website, address, city, state, and ZIP code.
Contact	Contact name, title, email, phone, and mobile number.
Source	Lead source and referral source.
Opportunity	Stage, probability, estimated value, and expected close date.
Follow-up	Priority, next follow-up date, and notes.

Default pipeline

Stage	Default probability
New	10%
Contacted	25%
Qualified	50%
Proposal Sent	75%
Won	100%
Lost	0%

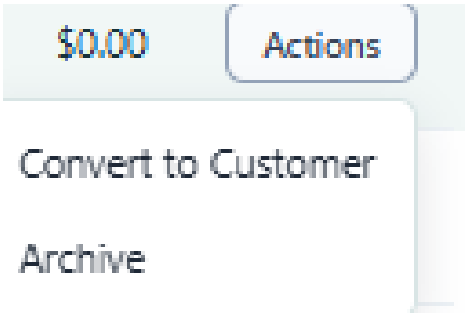
The percentages describe pipeline defaults, not a guarantee of a sale. Choose a stage that reflects the actual progress of the opportunity.

Write useful notes

Record the date, who you spoke with, what they need, and the agreed next action. Example: “October 12: Spoke with office manager. Requested product information. Follow up October 15 after review.” Keep fact and assumption separate.

Lead actions

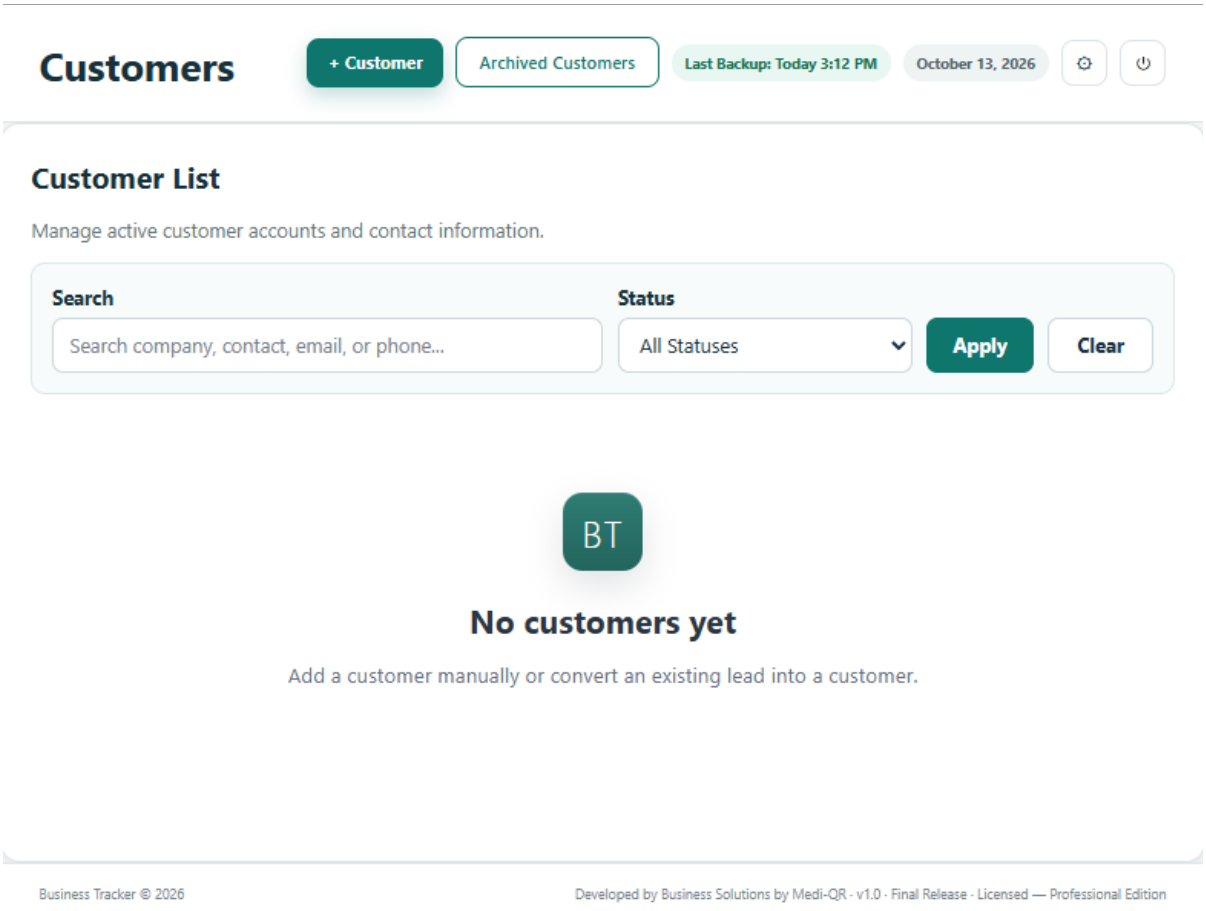
Open Actions beside a lead to choose Convert to Customer or Archive. Convert to Customer asks for confirmation; OK confirms and Cancel leaves the lead unchanged.



Lead actions

Customer list

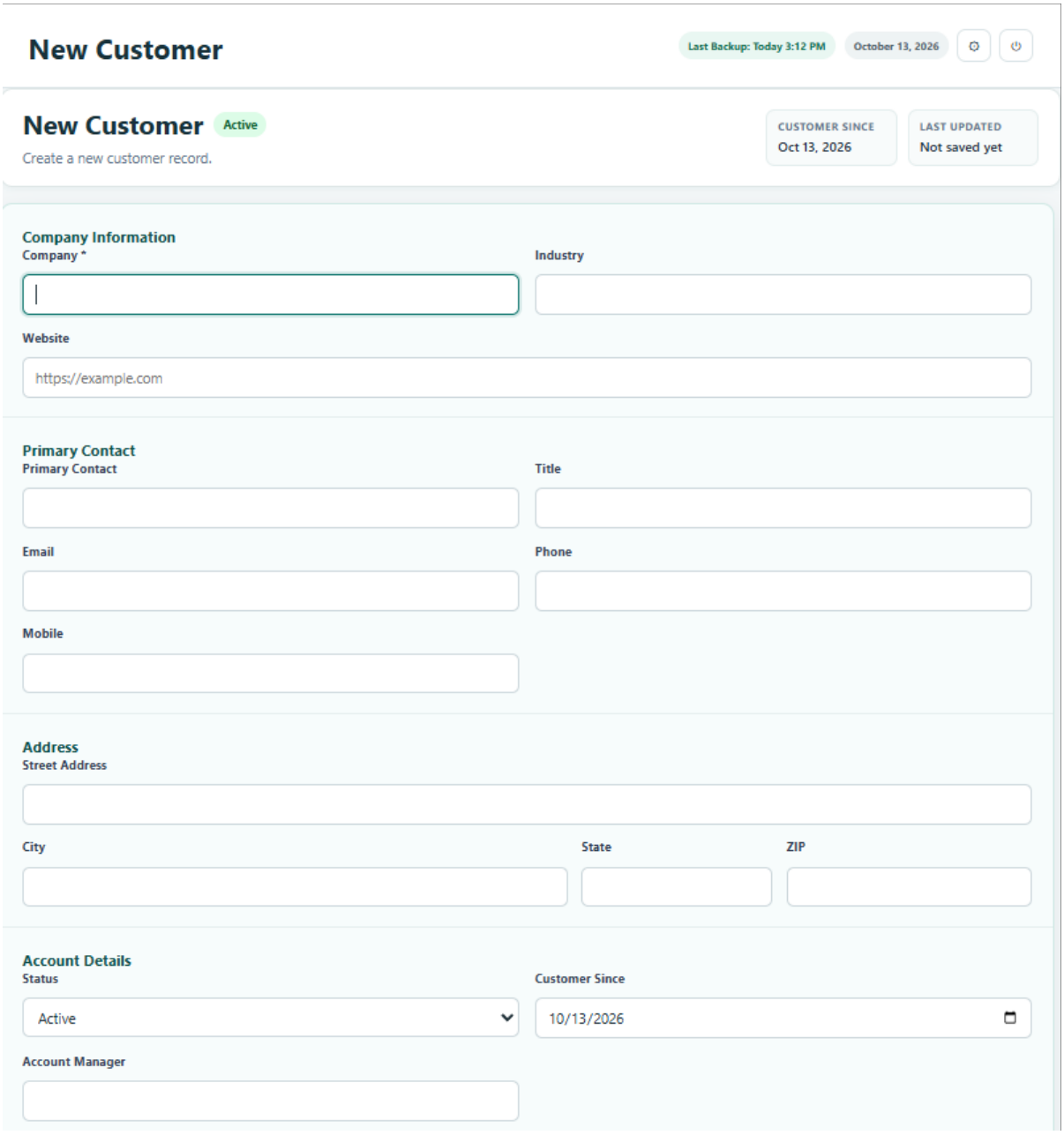
Open Customers to search and filter customer accounts. Click + Customer for manual entry. Archived Customers opens the archived customer list.



Customer list

Enter customer information

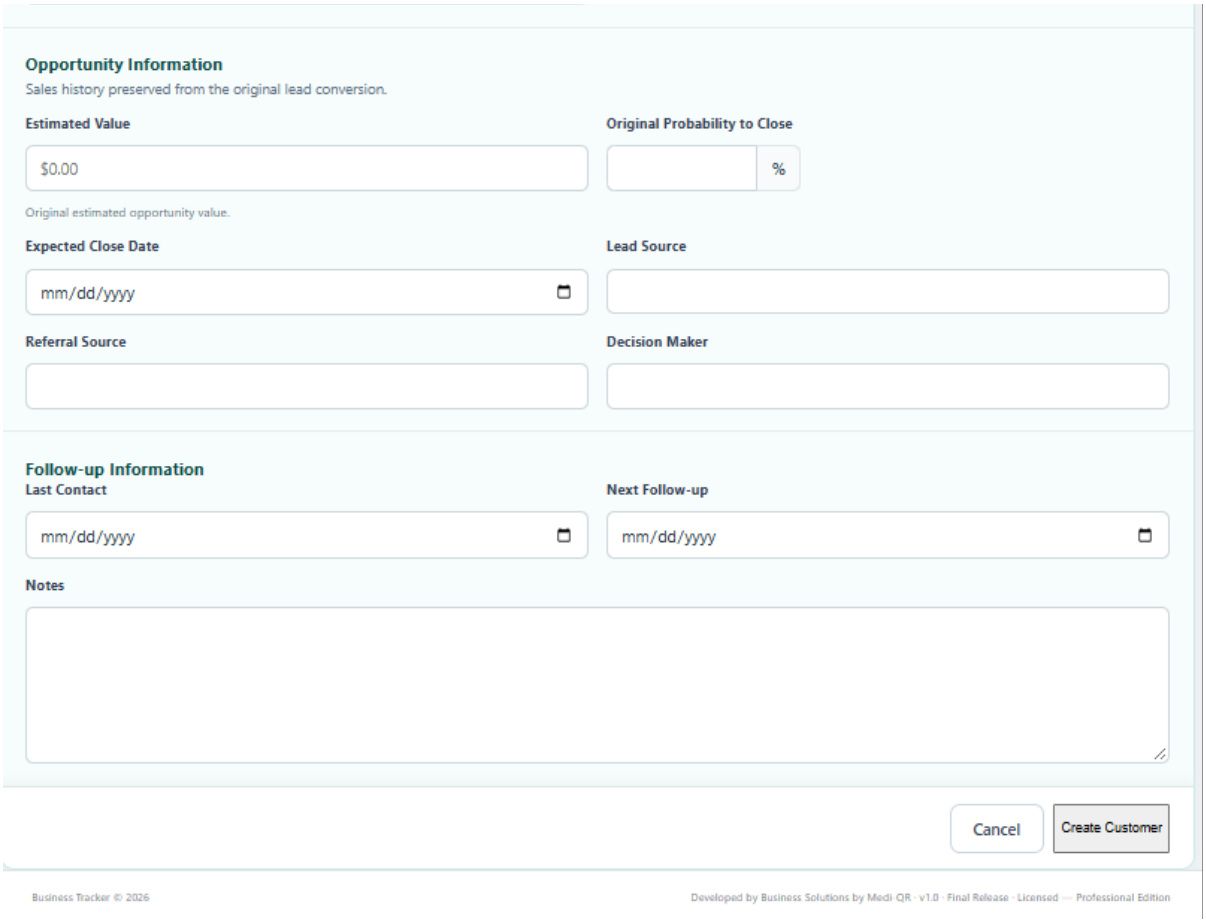
Enter Company, Industry, Website, primary contact, address, Status, Customer Since, and Account Manager. Company is required.



Enter customer information

Complete a customer record

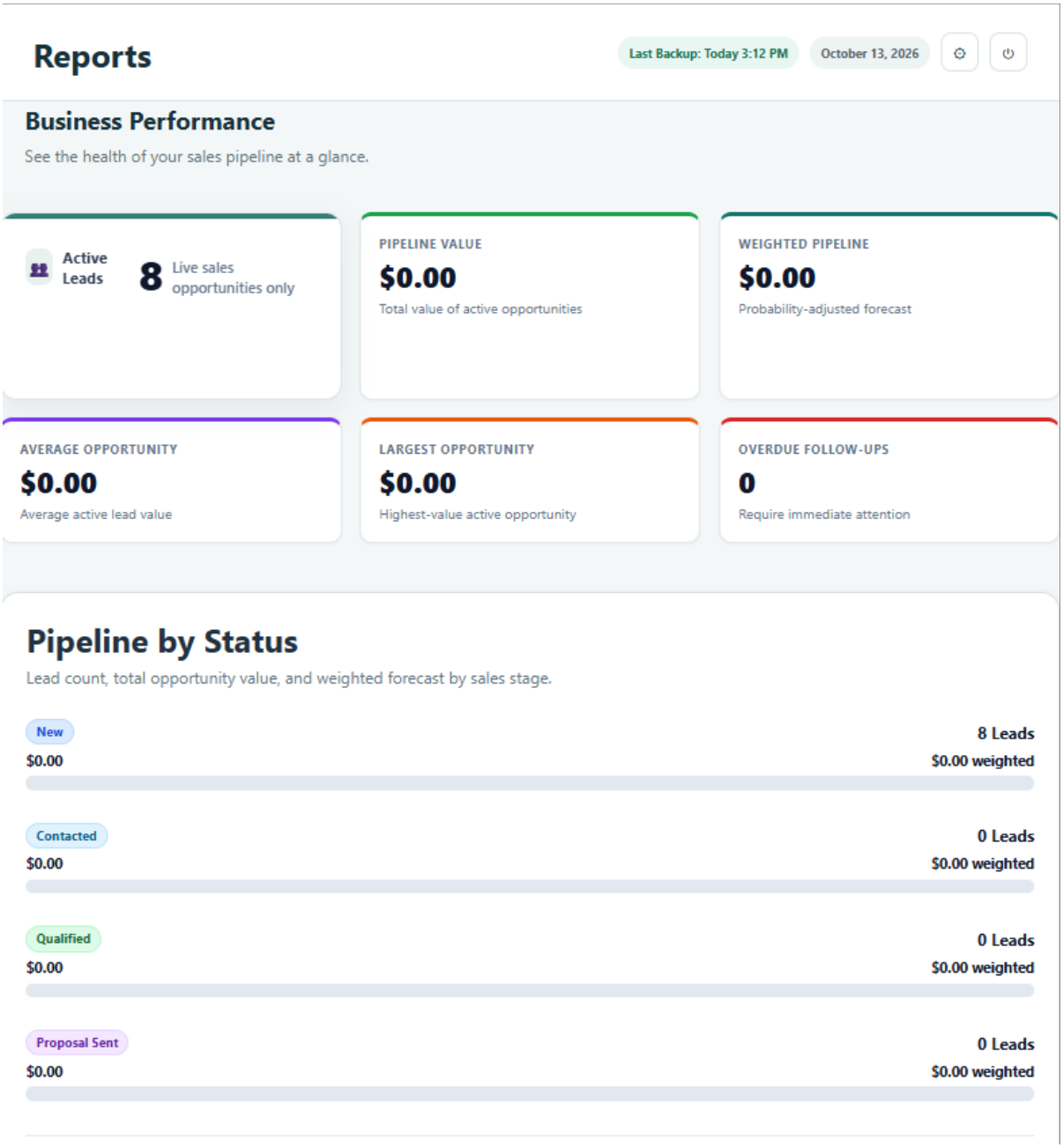
Review Opportunity Information, Follow-up Information, and Notes. Click Create Customer to save, or Cancel to leave without creating the record.



Complete a customer record

Read business performance reports

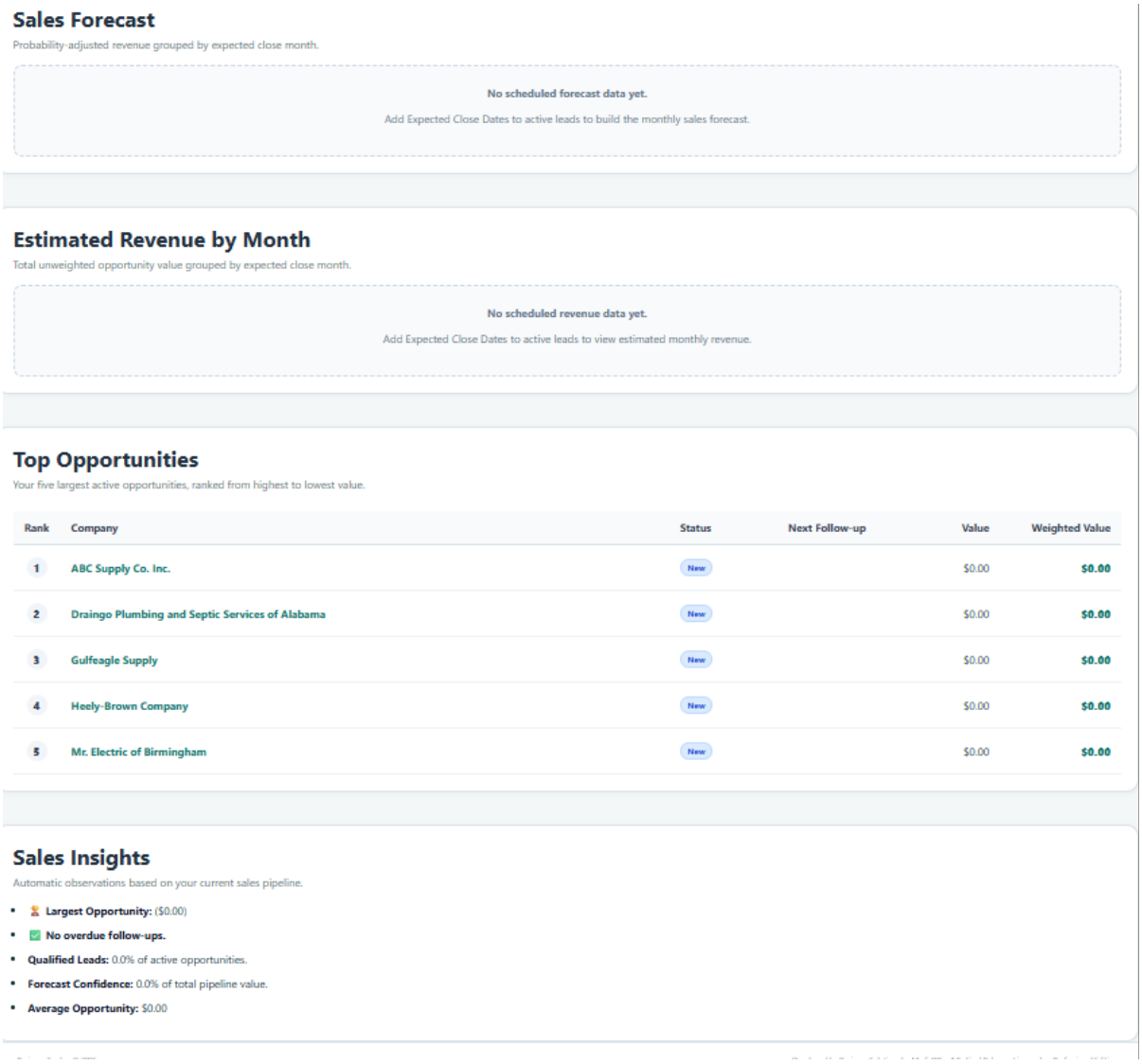
Use Business Performance to inspect lead counts, pipeline value, weighted value, and follow-ups. Pipeline by Status summarizes the sales stages.



Read business performance reports

Read forecasts and sales insights

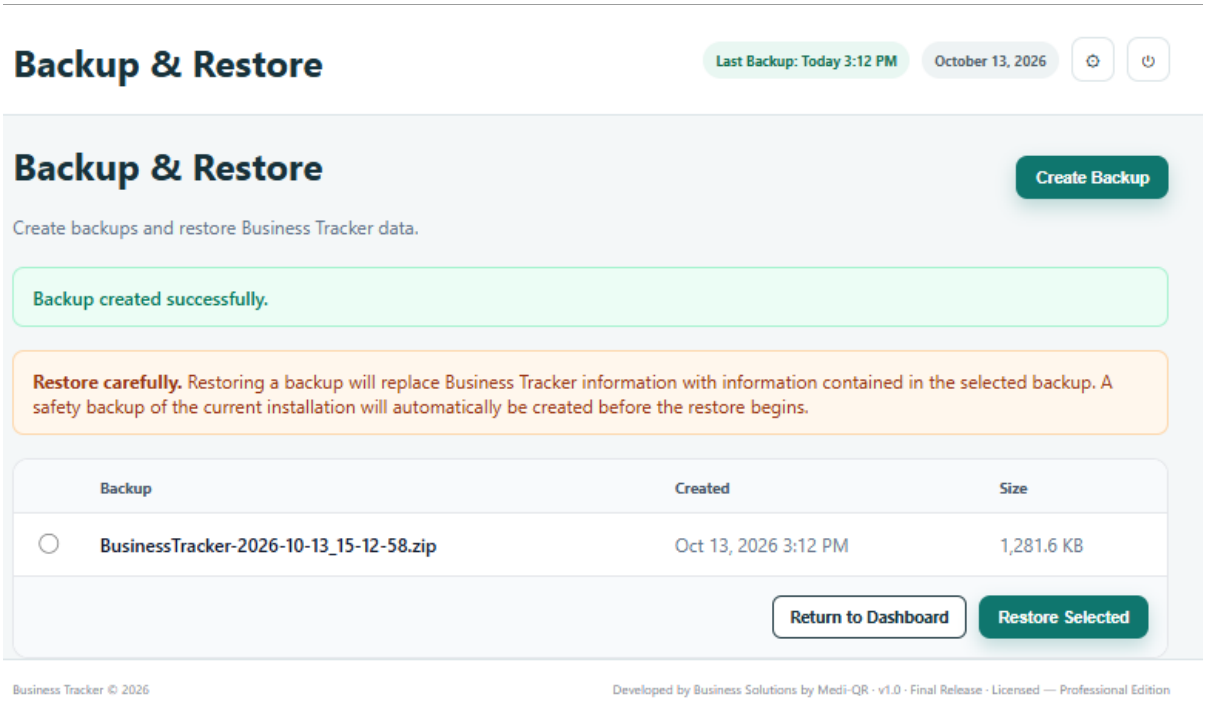
Set Expected Close Dates on active leads to populate monthly forecasts and estimated revenue. Top Opportunities ranks active leads by value; Sales Insights summarizes current pipeline information.



Read forecasts and sales insights

Create and restore backups

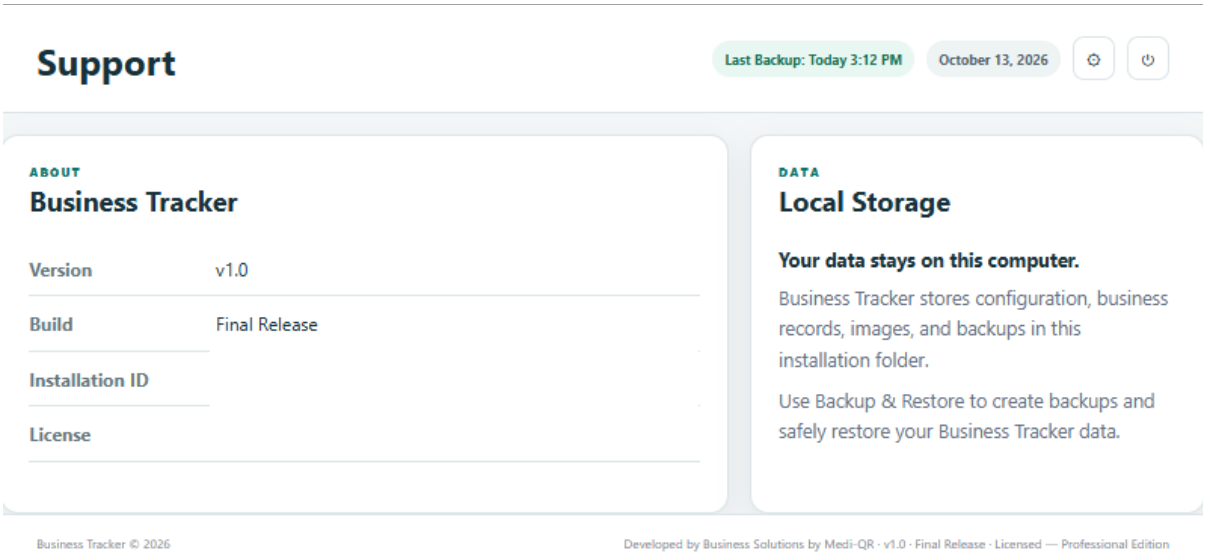
Click Create Backup and confirm the success message. To restore, select the intended backup and click Restore Selected. Current information will be replaced; a safety backup is created automatically before restoration.



Create and restore backups

Check application information

Support displays version, build, installation ID, license, and local storage information. Your data stays in this installation on this computer. Use Backup and Restore to protect it.



Check application information

Searching with Prospect Finder

Choose how to describe your prospects

Mode	Example description
Specific Business Type	Plumbing companies
Businesses That Use a Product or Service	Businesses selling industrial supplies
Businesses With a Certain Characteristic	Businesses matching a stated operating characteristic
Other / Describe What I Need	A plain-language description of the businesses you need

Use the mode that best matches your request. Begin with a clear description and a modest quantity so you can inspect the fit of the results before expanding the search.

Run a search

1. Open Leads in Business Tracker and click the pill-shaped Find Prospects button at the top of the page. In Prospect Finder, enter the prospect description and choose the appropriate mode.

2. Enter the location and search radius.

3. Choose the quantity of prospects requested.

4. If needed, choose Yes under Do you have additional requirements and describe your requirements in the text box. For example, specify locally owned businesses or multiple locations.

5. Choose whether to exclude previous prospects.

6. Review the request and your available credits, then start the search.

7. Wait for the result or error message before submitting another search.

Review the results

Review each business name, location, contact details, and website. Use the Fit Score and reasons as screening aids; check the business yourself before outreach.

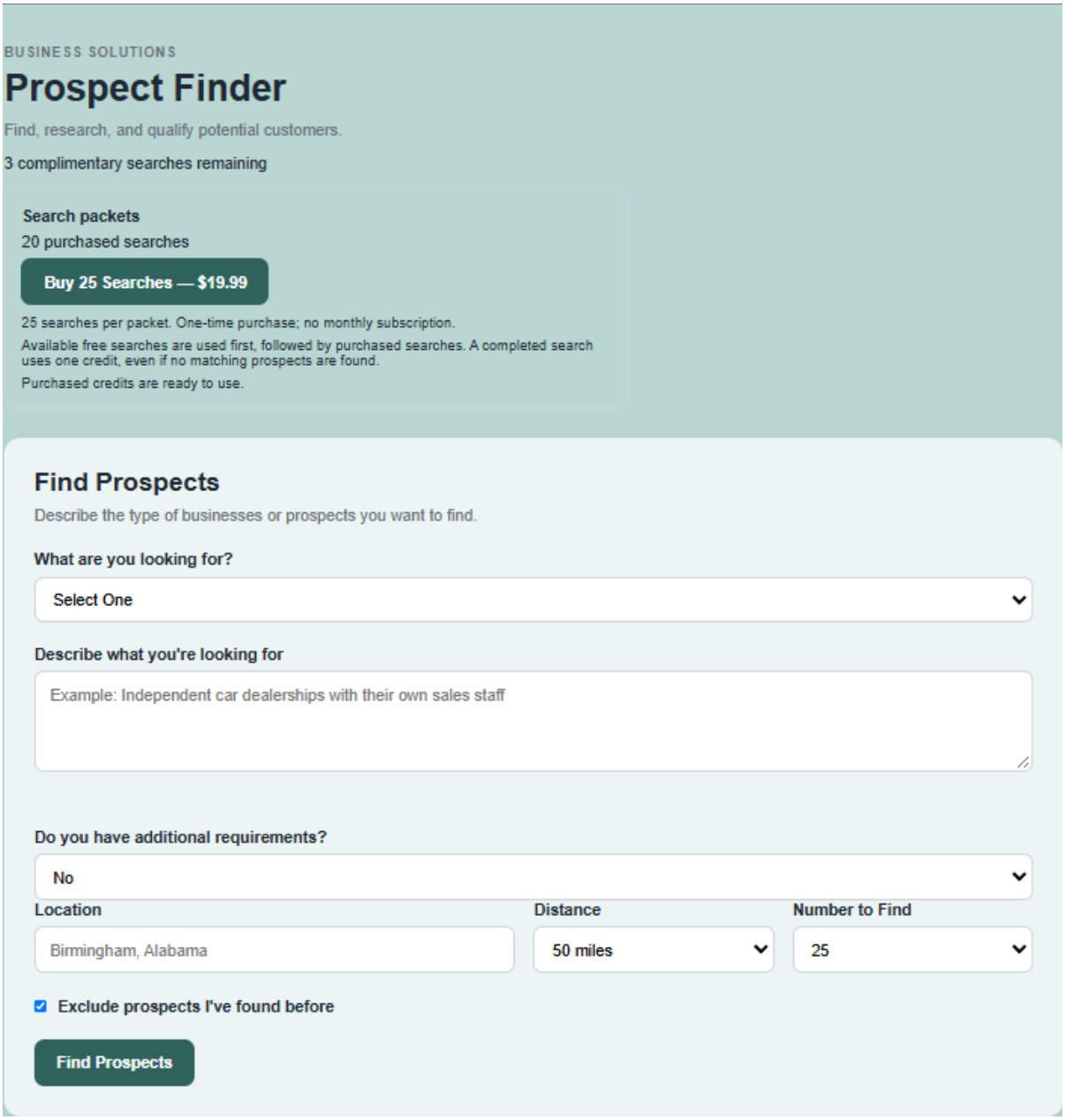
The result summary may distinguish new and previous prospects. Requested quantity and returned quantity can differ. A business appearing in search results is not a confirmed customer or a verified decision-maker.

Improve a weak search

If the results are too broad, use a more specific description and location. If too few results appear, consider a wider Distance or broader requirements. Inspect the current results before spending another search credit.

Set up a prospect search

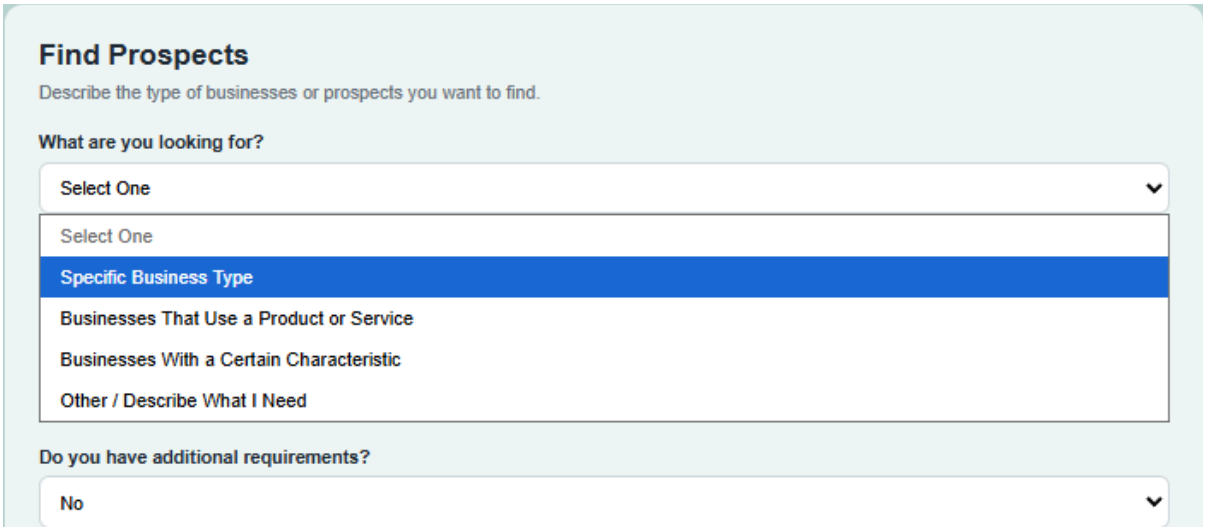
Choose a search mode, enter a description and Location, select Distance and Number to Find, and decide whether to exclude previously found prospects. Check the displayed balances before clicking Find Prospects.



Set up a prospect search

Choose a search mode

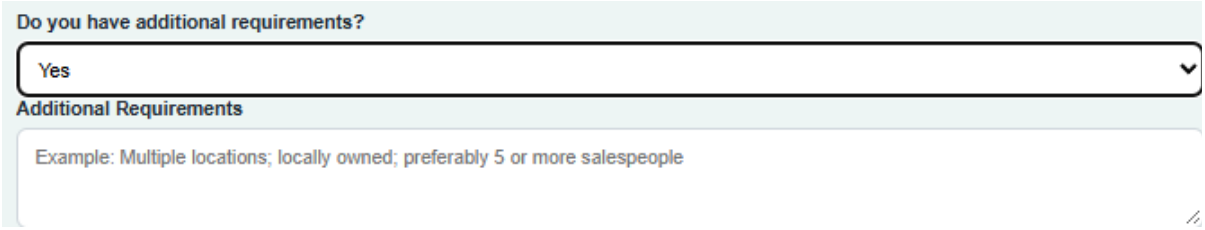
Use Specific Business Type for a business category; Businesses That Use a Product or Service for potential users of an offering; Businesses With a Certain Characteristic for an operating trait; or Other / Describe What I Need for a broader description.



Choose a search mode

Add search requirements

Choose Yes under additional requirements to display the text box. Describe restrictions such as multiple locations, locally owned businesses, or a preferred sales-team size.



Add search requirements

Inspect prospect information and fit

Open View from the results. Check Business Information, Qualification, Why This Score, and Prospect History. The Fit Score screens business suitability; it does not verify a named contact.



Inspect prospect information and fit

Research prospect contacts

Research and verify a sales contact

1. Open a prospect and review the Sales Contact fields. Click Research Prospect to look for decision-maker information and supporting sources.

2. Read the research results and open relevant View Source links. Confirm that the person, role, and business match the prospect you are reviewing.

3. When a named candidate offers Verify Person, click it and review the verification result and supporting evidence. Check the business affiliation and role before proceeding.

4. If Use Verified Contact is offered for the person you want, click it and confirm the selection when prompted. Review the Sales Contact fields to make sure the intended information was applied.

5. If a Save Contact control is displayed, save the contact before leaving the prospect. Check the selected contact information again before sending the prospect to Business Tracker.

6. After importing, review the contact name, title, email, and phone in Business Tracker. Correct missing or inaccurate details and click Save Changes.

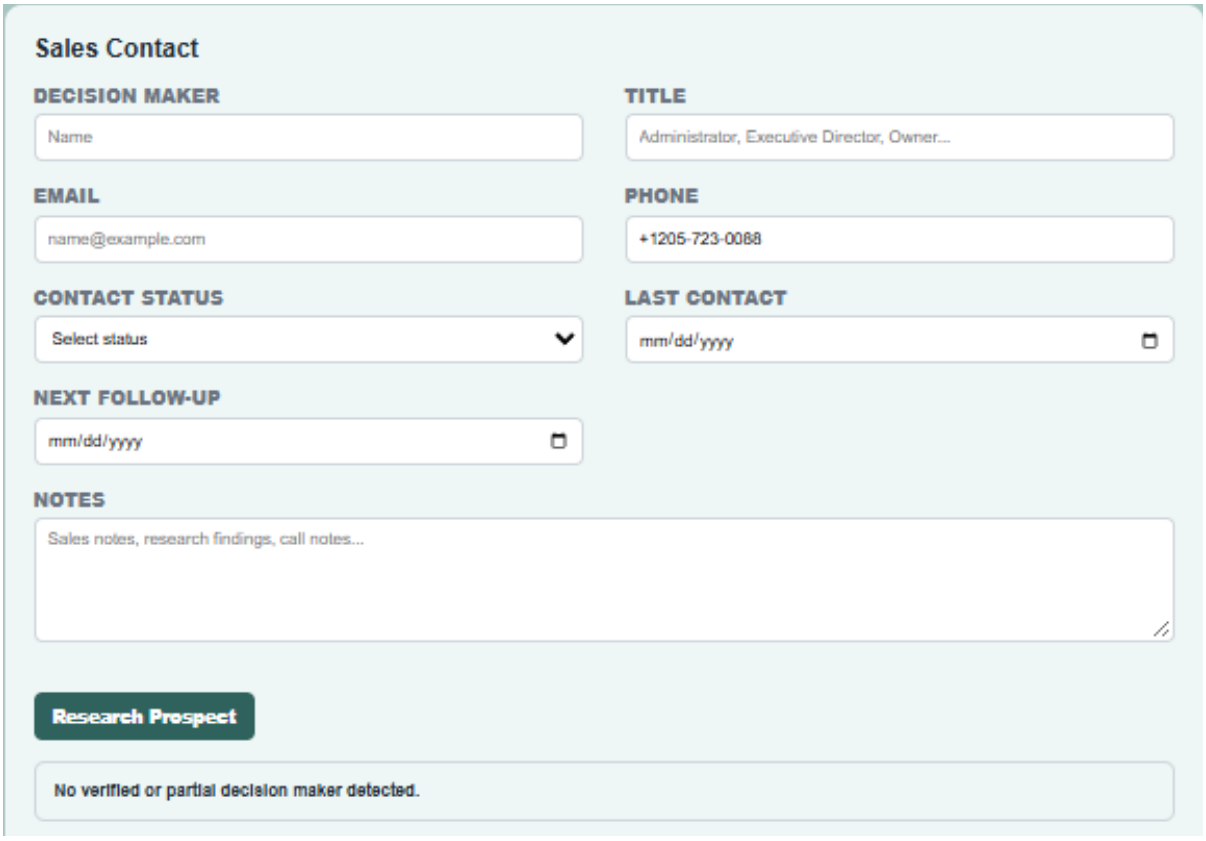
When no suitable contact is found

Leave unknown names and emails blank. You can import the business information and add contact details later when you have reliable information. The next page illustrates this no-contact result.

Contact research can be incomplete or outdated. Review the evidence yourself before outreach; a verification result does not guarantee that a person or role is current.

Review contact research

The Sales Contact section contains contact and follow-up fields. Research Prospect returns sources for review. This example reports no verified or partial decision maker. Leave unknown names and emails blank; source results may be unrelated.



Review contact research

Import and review candidates in Business Tracker

1. In Business Tracker, open Leads and click the pill-shaped Find Prospects button at the top of the page. Keep both tabs open during the import.

2. Select the prospects you want to import.

3. Choose Send to Business Tracker and wait for the import result.

4. For one prospect, review the imported lead in Edit Lead. For multiple prospects, review the available New Imports or import-review list.

5. Check company, contact, email, phone, address, city, state, and ZIP code.

6. Add stage, priority, next follow-up, and notes where needed. Save each reviewed lead.

Confirm the handoff

An imported indicator in Prospect Finder means you should check Business Tracker before sending the same prospect again. If the Business Tracker tab does not come to the front, switch to it and look for the imported record or review list.

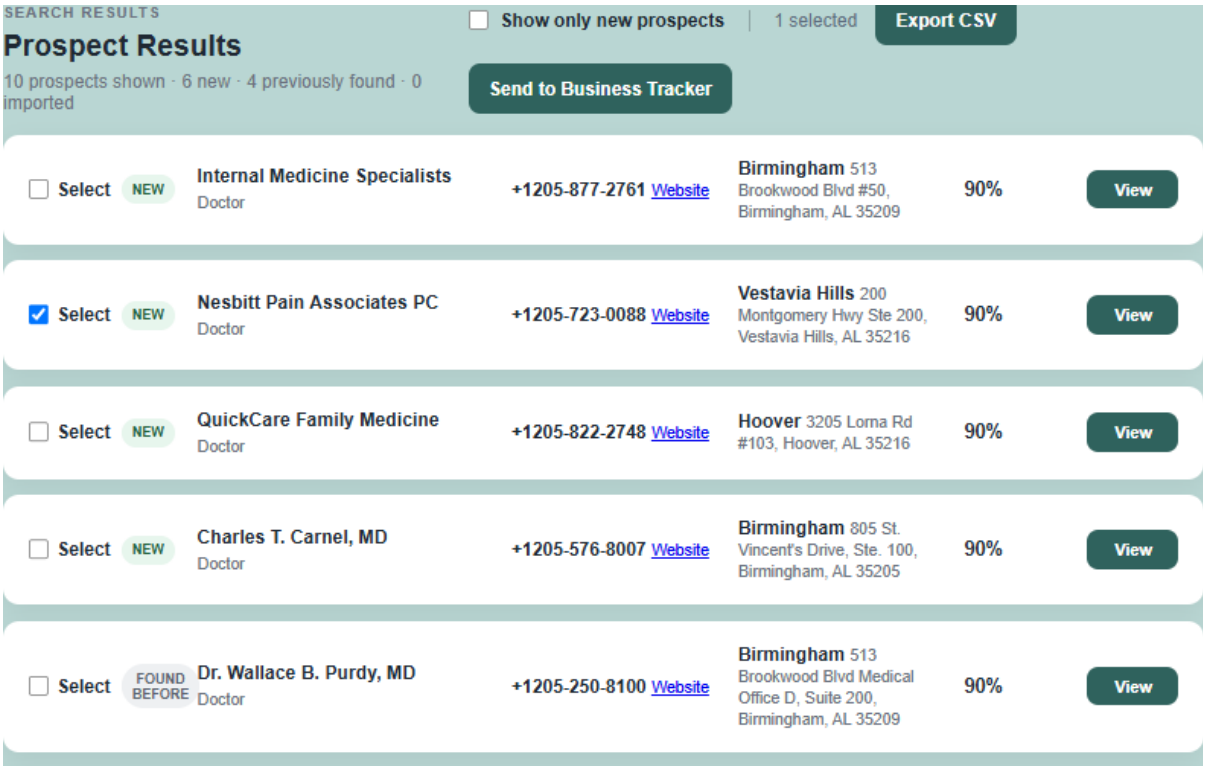
Review possible duplicates before keeping additional records. Do not assume that similarly named businesses are identical; compare address and contact information.

Finish the review

Imported records are a starting point. Completing the lead review gives you a usable sales record with a clear next action. Confirm the saved information in Business Tracker before beginning outreach.

Select a prospect to import

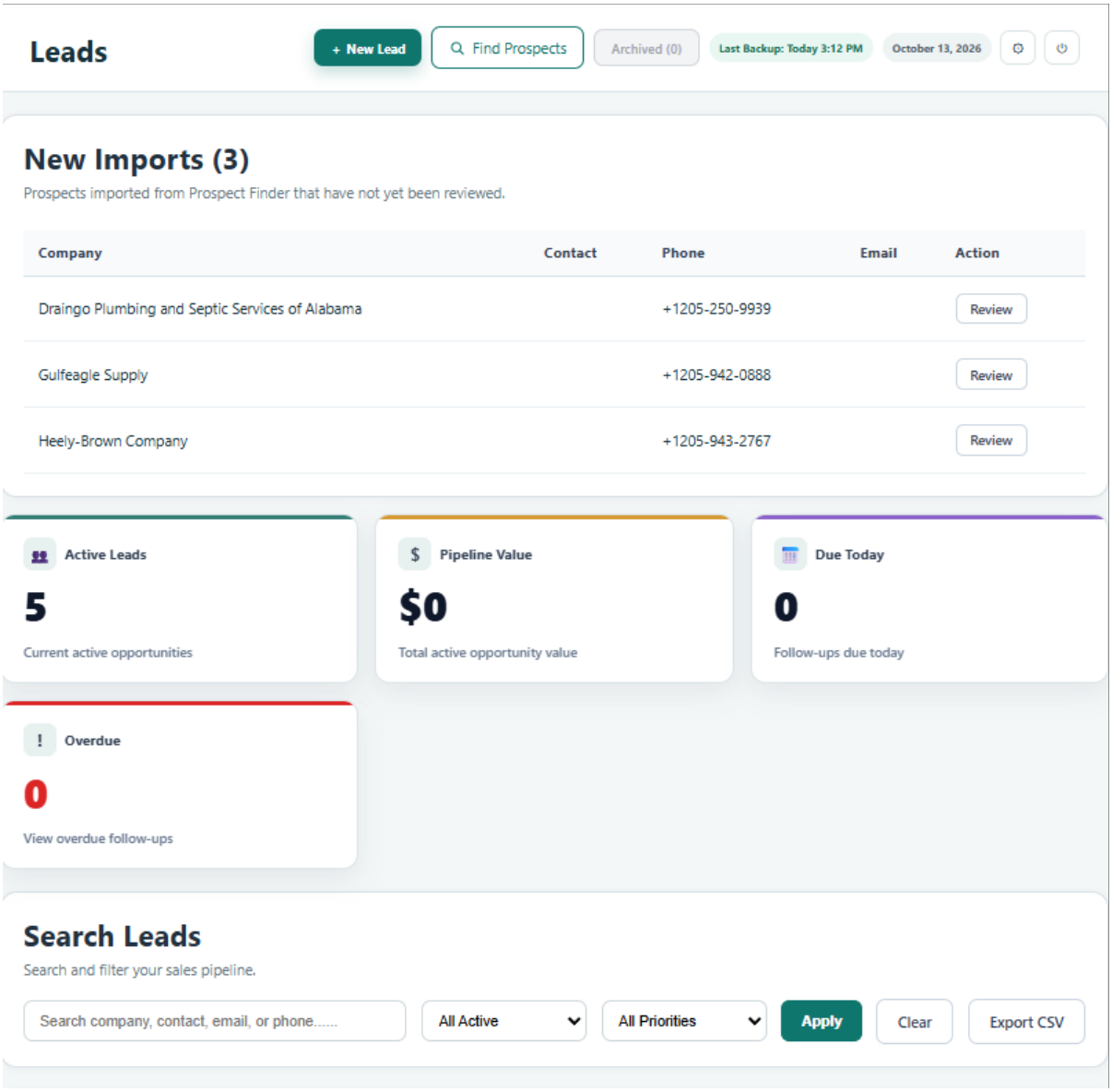
Select the checkbox for each intended prospect, then click Send to Business Tracker. For one selected prospect, review the Edit Lead screen in Business Tracker.



Select a prospect to import

Lead review and search

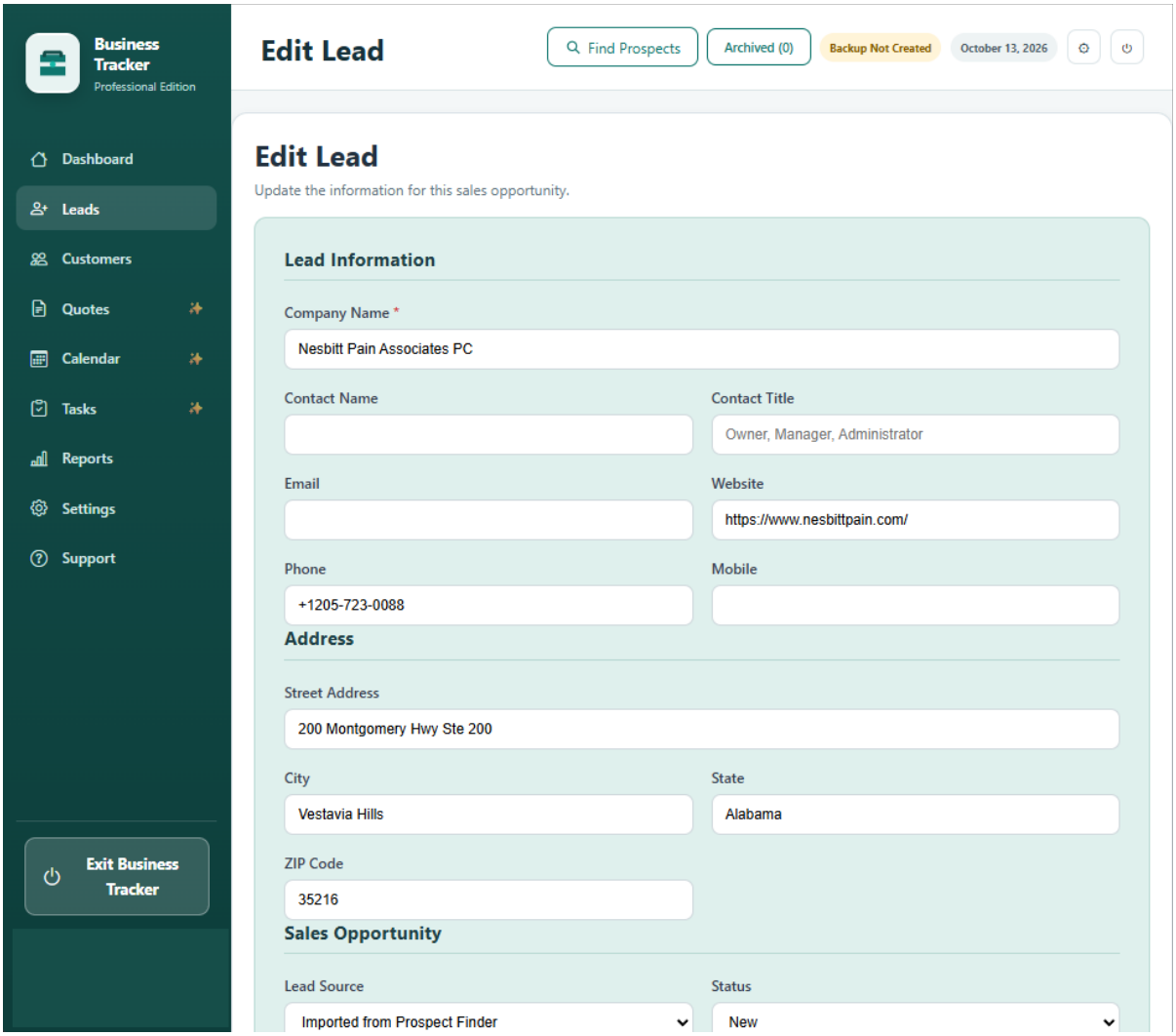
After importing multiple candidates, click Review beside each entry in New Imports. Check and save each lead. Search and filter the Sales Pipeline using the controls below.



Lead review and search

Check imported business information

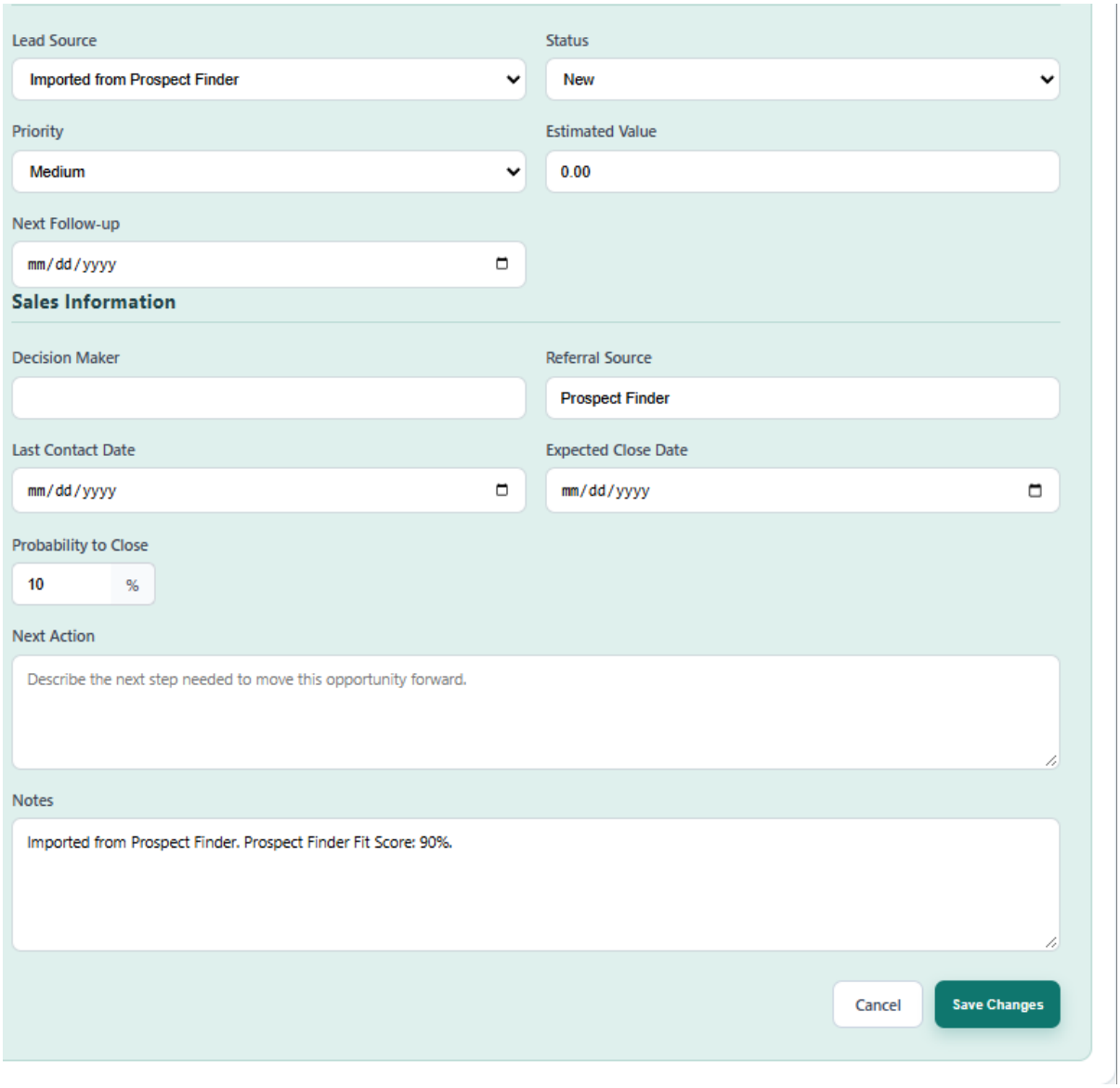
Check company, website, phone, and address. Contact Name remains blank when no person has been identified. Complete missing information when you have reliable details.



Check imported business information

Complete and save the lead

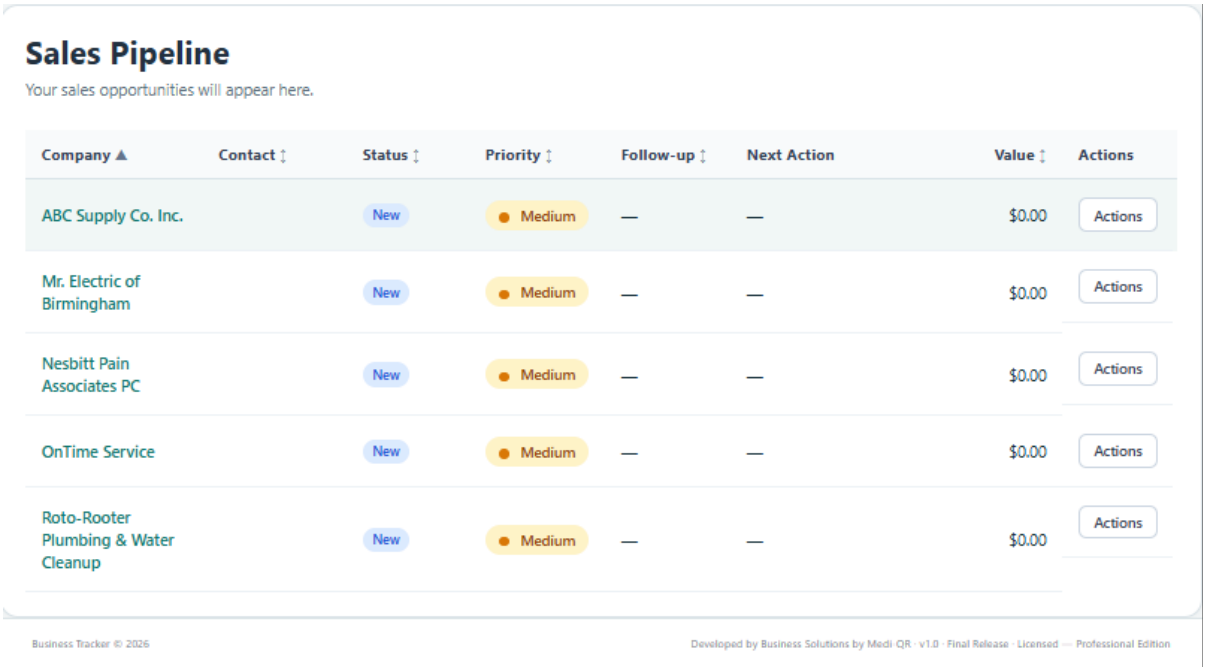
Review status, priority, value, follow-up dates, probability, Next Action, and Notes. Lead Source identifies the Prospect Finder import. Click Save Changes.



Complete and save the lead

Confirm the saved lead

Find the company in the Sales Pipeline after saving. Review its status, priority, follow-up, Next Action, and value.



Confirm the saved lead

Search credits and daily care

Understand your balance

Prospect Finder distinguishes complimentary searches from purchased searches. Use the balance shown in the application to see what is available for your account. Trial and activation grants depend on the offer supplied with your installation.

The search panel offers packets of 25 searches for $19.99 as a one-time purchase with no monthly subscription. Available free searches are used before purchased searches. A completed search uses one credit even when no matching prospects are found. Purchased credits are ready to use. Confirm the packet and price at checkout.

Purchase a search packet

1. Open the search-credit purchase option shown in Prospect Finder.

2. Check the packet size and price on the checkout page.

3. Complete checkout and retain the receipt.

4. Return to Prospect Finder and check the updated purchased-search balance.

5. After payment succeeds, refresh the Prospect Finder page. If the purchased credits still do not appear, keep your receipt and contact support before paying again.

If a search fails, note the error and the balance before and after the attempt. Whether an attempt is charged must be confirmed from the transaction and usage records; do not assume every failed request is free.

Protect your records

Open Backup and Restore by clicking the backup-status badge at the top of Business Tracker. Click Create Backup and wait for Backup created successfully. The table shows the backup filename, creation time, and size. To restore, select the intended backup and click Restore Selected. Restoring replaces current Business Tracker information with the selected backup; the application states that it automatically creates a safety backup before restoring. Restore only when replacement of the current records is intended.

Do not edit internal application files to change credits, activation, or stored records. Keep license information and payment receipts separate from everyday sales notes.

Close a session

Save your work, then click Exit in Business Tracker. For unsaved edits on the current page, Cancel keeps you editing; OK exits without saving. After saving, Exit proceeds without a warning. The closing page attempts to close its tab after three seconds; if it stays open, use the tab’s X. Prospect Finder has a separate Close Session control.

Before starting a new Prospect Finder session, finish reviewing useful search results. Do not assume an earlier result screen will be restored after relaunching.

Troubleshooting and support

Symptom	First action
Application does not open	Launch it from its installed shortcut. Note any displayed error.
Old tab does not respond	Relaunch the application from its shortcut and use the current session.
Import did not open a visible lead	Switch to Business Tracker and check the imported record or New Imports before retrying.
Contact information is missing	Review the selected contact in Prospect Finder and the saved lead fields in Business Tracker.
Search returns few results	Review radius, description, and required contact fields before another search.
Payment succeeded but credits are missing	Refresh the Prospect Finder page. If purchased credits still do not appear, keep your receipt and contact support before paying again.
Installer download is blocked	Capture the exact browser warning and contact support.

Information to include with a support request

For help, email support@medi-qr.com. Include the application name, version, edition, task, exact error, and a screenshot with sensitive information removed.

For an import problem, include whether you selected one or multiple prospects and whether Business Tracker already had a tab open. For a credit problem, include the purchase date, packet, displayed balance, and receipt reference. Never send payment card details, passwords, or private activation credentials in a screenshot.

Where to get help

Email: support@medi-qr.com

Website: https://business-solutions.medi-qr.com