Account Process User Guide

Account Process:

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- ➔ How to Add Multiple Contacts under Account?
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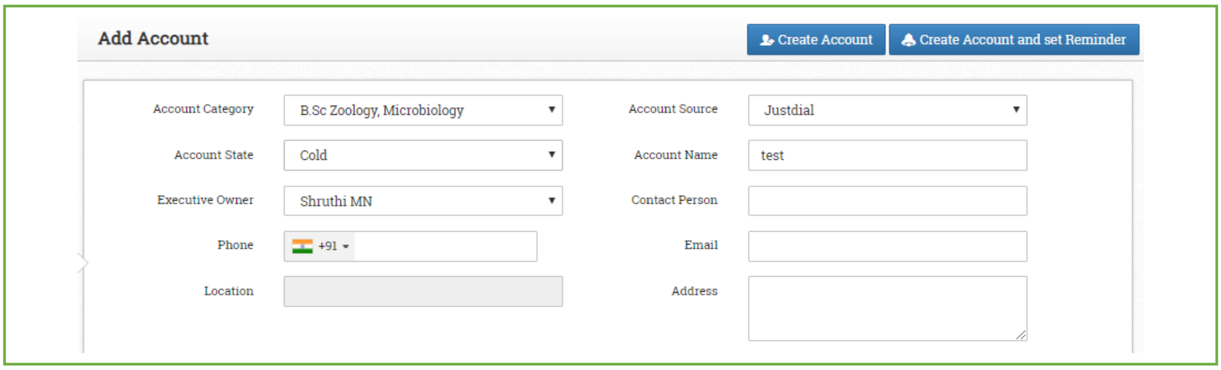
- ## How to Add Account?

Description: All the new enquiries/prospects/suspects are added as a Account in CRM for mainly B2B clients.

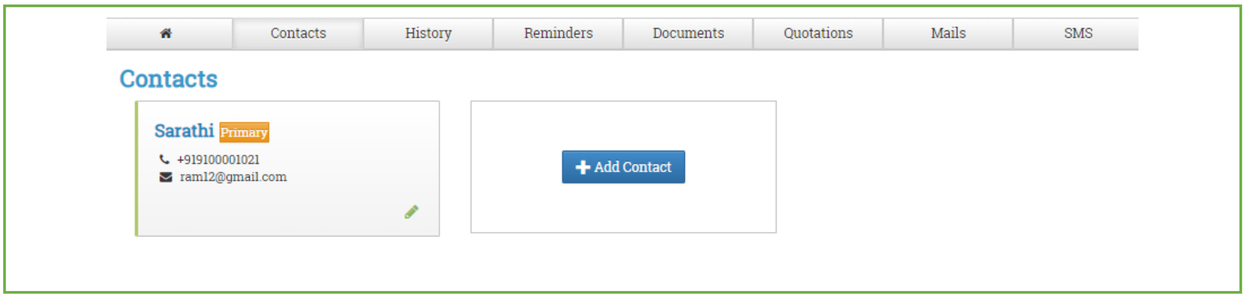


To **Add Account,**

1. Go to the menu **Accounts**
2. Click on **Add Account**
3. Enter all the mandatory details
4. Click on **Add Account with reminder to Account Owner**

- ## How to Add Multiple Contacts under Account?

Description: User can add multiple contacts under each Account.



To **Add Contacts**,

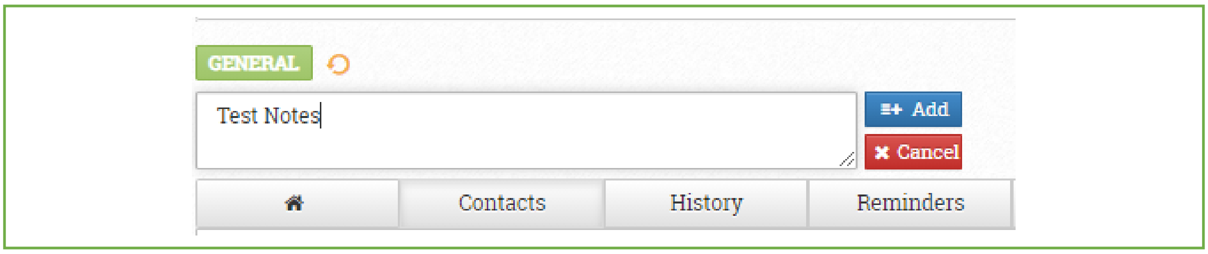
1. Go to the menu **Accounts** -> **My Accounts**
2. Open **Account Manage page**
3. Click on Contacts tab from the left panel
4. Click on +**Add Contact**
5. Enter the contact details and click on **Save**

- ## What are Remarks and How to Add it?

Description: Remark is a note of update/ interactions done by the Owner with the account.

Remarks can be added in multiple ways:

- From Account Manage page
- From Account search page/My Accounts, in Account number dropdown - click on Add Note/Remark
- From Advanced Search, under Actions dropdown - click on Add remark

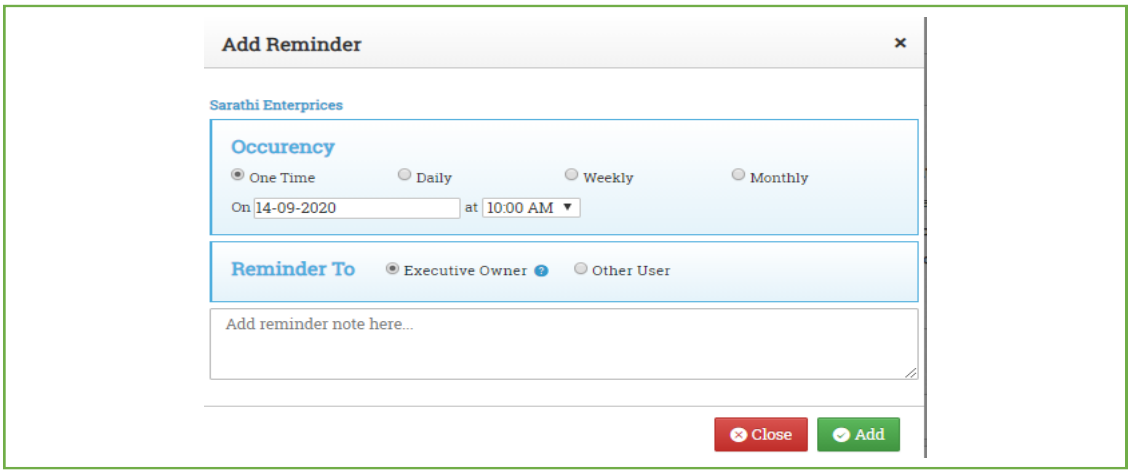


To **Add Remarks**,

1. Go to the menu **Accounts** -> **My Accounts**
2. Open **Account Manage page**
3. Click on text box **Add remarks** here
4. Select the **Remark Type**
5. Click on **Add Remarks**
6. Enter the notes and click on **Save**

- ## How to Add Reminder?

Description: For all the future follow-ups with the client, all the Executive owners must have a mandatory reminder under every Account.



To **Add Reminder,**

1. Go to **Search Account**
2. Open the **Account Manage page**
3. Click on **Add Reminder** under **Actions** which is on top right section

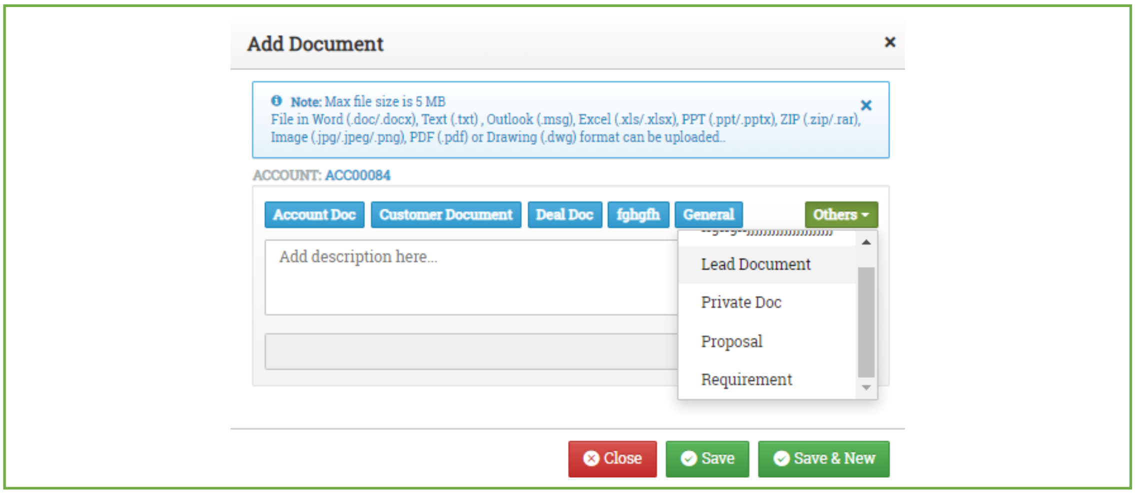
4. Select the Option of occurrence and the condition User want to set
5. Select the **date and time** for the reminder
6. Enter the **reminder note**
7. Click on **Add**

Note:

- All User Reminder will be shown under Reminder tabs in Manage Page
- User can close the reminder by clicking on first icon **Tick mark**
- User can close and Add new reminder by clicking on the second icon**"+"**
- User can reschedule the reminder by clicking on the third icon.

• How to Add Documents?

Description: All the account related documents can be uploaded under every account in the system.

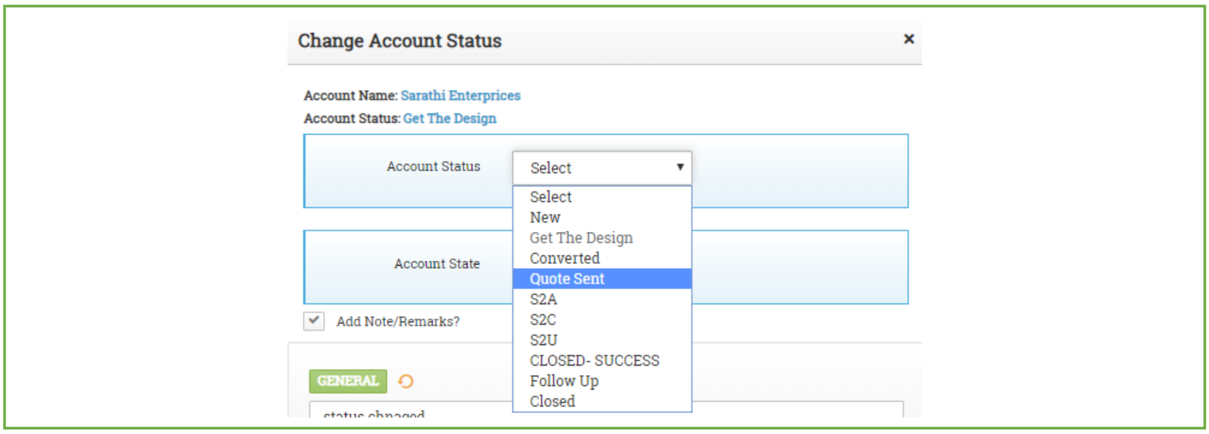


To **Add Documents,**

1. Go to **Search Account**
2. Open the **Account Manage page**
3. Click on **Add Document** under **Actions** which is on top right section
4. Select the **Document Type**
5. Enter the description and choose the file
6. Click on **Submit**

- ## How to Change Account Status?

Description: User can change the status based upon Account workflow defined in the system. (New->Contacted->Quote Sent etc.)

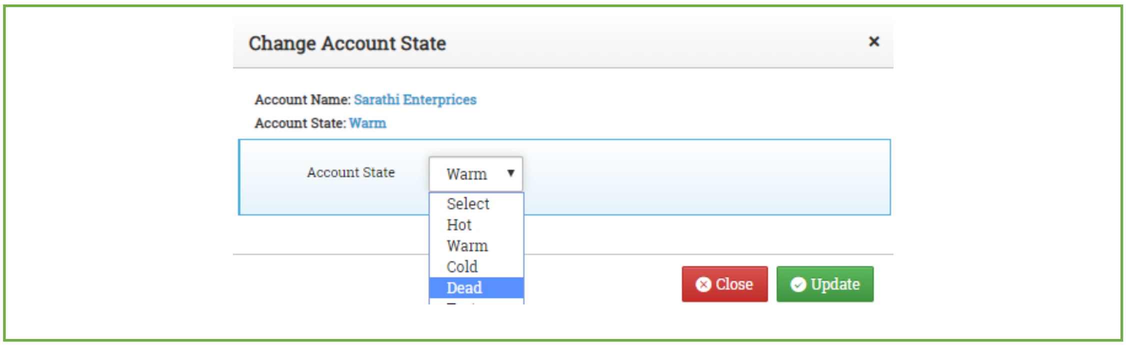


To Change **Account Status**,

1. Go to **Search Account**
2. Click on **Manage Account** page from the drop down / double click on any Account row for which User need to do changes
3. Click on **Change Status** under **Actions**
4. Select the **New Account status**
5. Click on **Update**

- ## How to change Account State?

Description: User can change the account state based on the expected closure time.

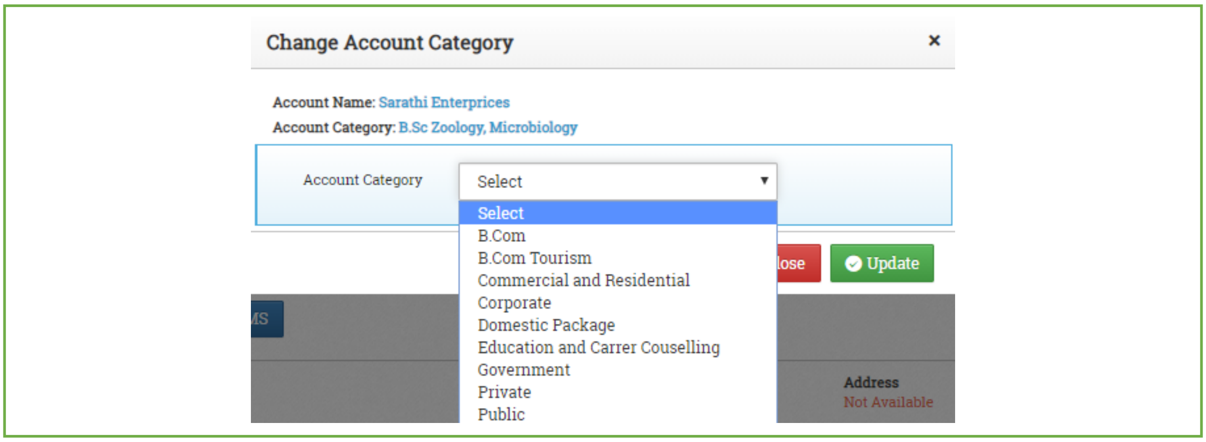


To Change **Account State**,

1. Go to **Search Account**
2. Click on **Manage Account** page from the drop down / double click on any Account row for which User need to do changes.
3. Click on **Change State** under **Actions**
4. Select the **New Account State**
5. Click on **Update**

- ## How to Change Account Category?

Description: User can change the Account Category if the permission is enabled by Admin.

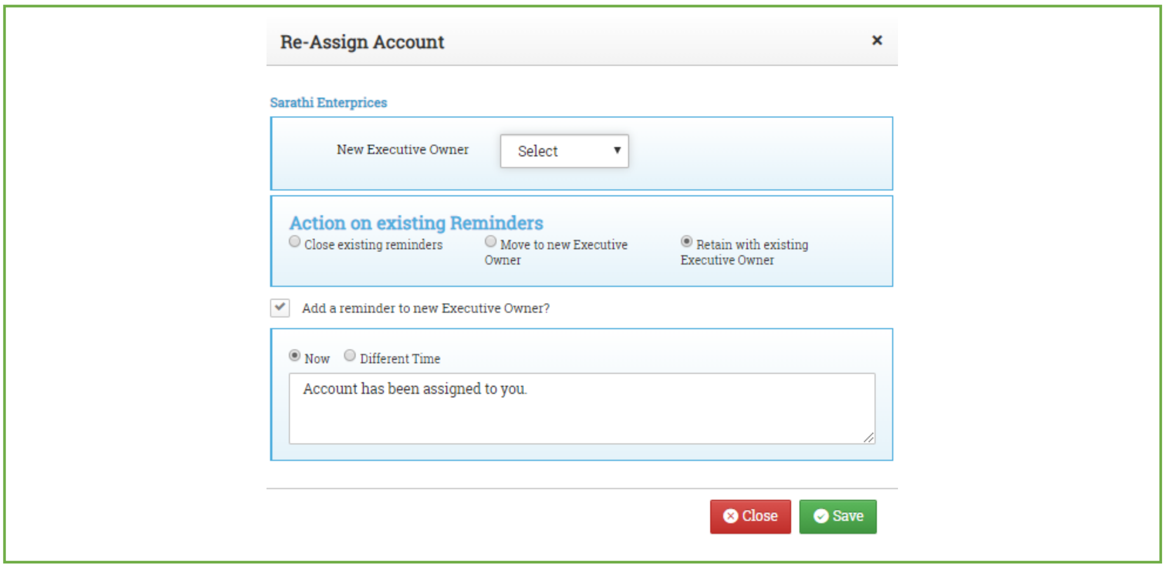


To Change **Account Category,**

1. Go to **Search Account**
2. Click on **Manage Account** page from the drop down / double click on any Account row for which User need to do changes.
3. Click on **Change Account Category** under **Actions**
4. Select the **New Account Category** with new **Account Owner** and **Status**
5. Click on **Update**

- ## How to Re-Assign an Account from one Owner to another Account Owner individually?

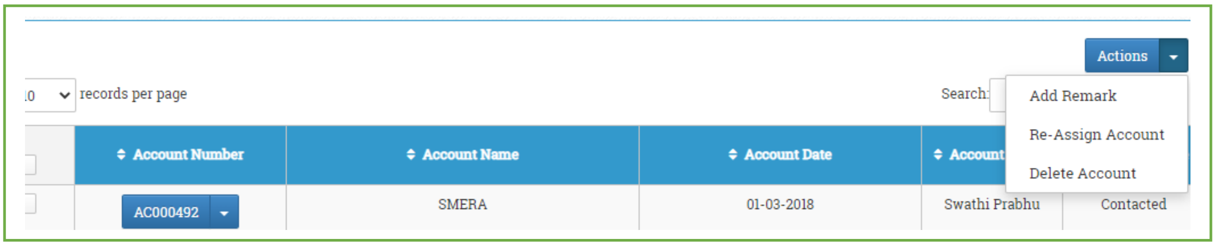
Description: An Account can be reassigned to other user to take care of the follow-up's/any particular task if the current owner is unavailable.



To **Re-Assign Account,**

1. Go to **Search Account**
2. Click on **Manage Account** page from the drop down / double click on any Account row
3. Click on **Reassign Account** under **Actions**
4. Select the **New Account Owner**
5. Choose the Action on Existing Reminders to move to New Account Owner
6. Click on **Save**

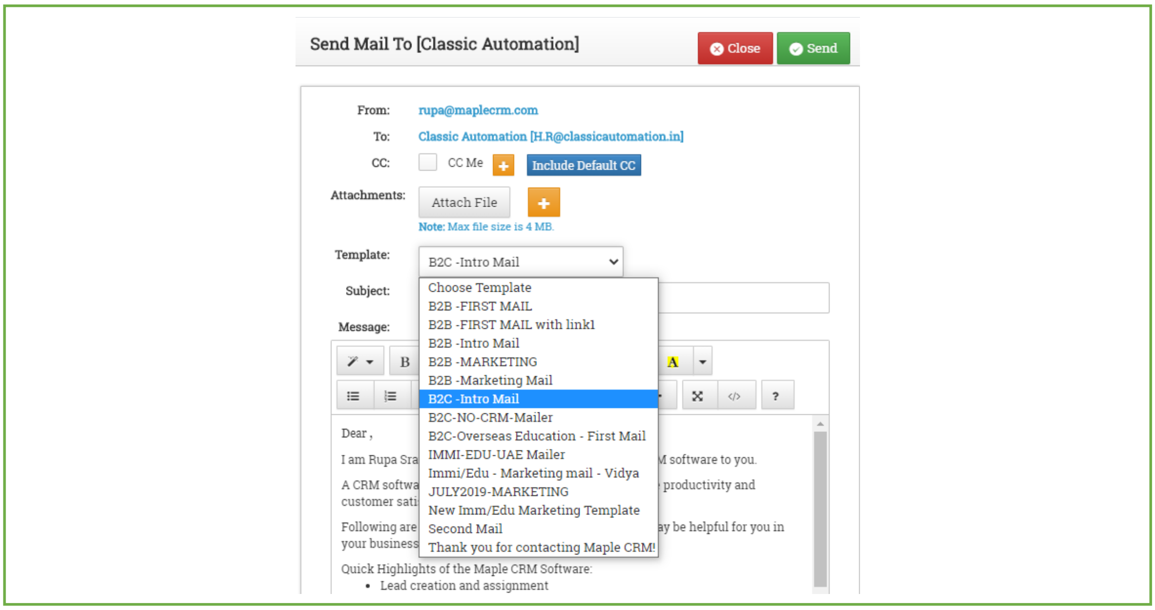
- ## How to Re-Assign Accounts from one Owner to another Account Owner in Bulk?



1. Click on **Search** button (Near to '+' symbol in top right of the page) and go to '**Advanced Search'**
2. In Search in, select the context " Account" and then give the conditions (such as Account Owner is XXX) and click on 'Search'
3. Give the 'records per page' User want. ie, 10/25/50/100 and click on below box [tick mark] ; so its selects the list
4. Click on 'Actions'(right side) and **Reassign Account**
5. Select the **New Owner** and **Verify**

- ## How to Send Mails in Account?

Description: Maple supports Send Mail [individual] to the Accounts by choosing preconfigured email templates or drafting the mail on the fly.



To **Send Mail,**

1. Go to **Search Account**
2. Click on **Manage Account** page from the drop down / double click on any Account row
3. Click on **Send Mail** blue icon
4. Choose the template
5. Click on **Send**

- ## How to Send SMS in Accounts?

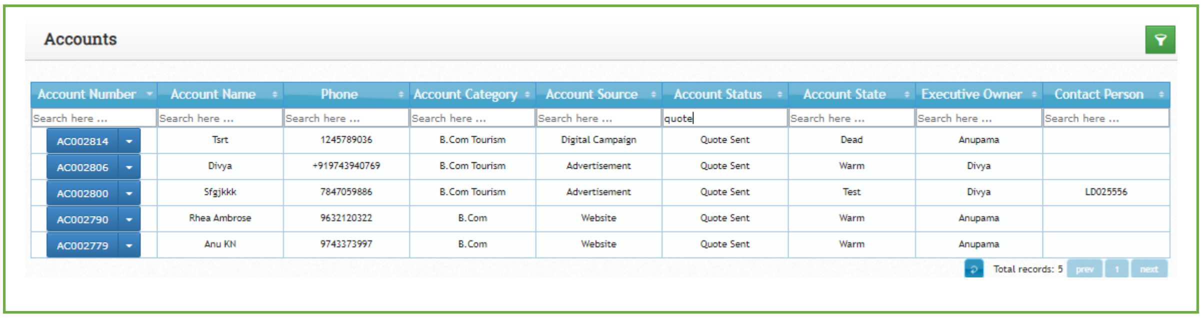
Description: Maple supports Send SMS [one to one] to the Accounts by choosing preconfigured SMS templates.

To **Send SMS**,

1. Open the **Manage Account** page
2. Click on **Send SMS** blue icon
3. Select the **SMS Template**
4. Click on **Send**

- ## How to Search for an Account?

Description: User can search for Account quickly by entering the text directly in input box of the column.



To **Search Account**,

1. Click on **Account** -> **Search Account** from the left panel
2. Enter the text directly in the input box of the column User wish to search
3. The result shall display the matching criteria based on User input

Note: User can also search for Accounts from the Search box on the top header. User can enter the input text directly and click on enter button.

- ## How to create Custom Views?

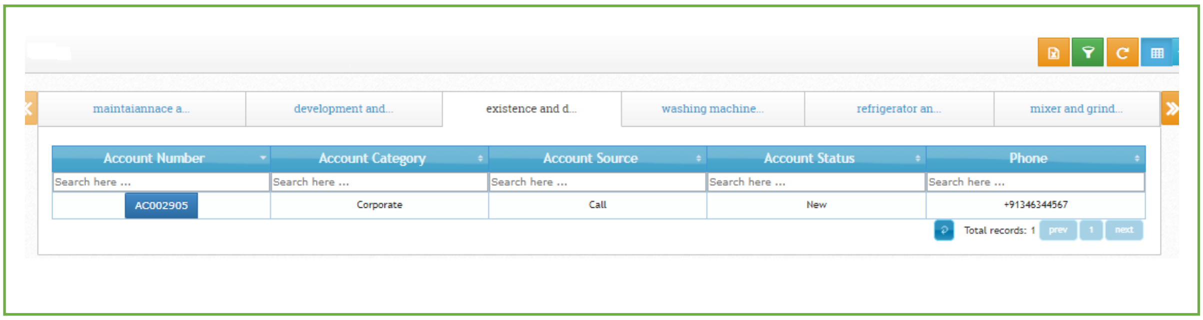
Description: User can create multiple custom views [Tabular /Grid] based on different conditions to check the updates easily. [Ex : Todays Update, , Account Assigned Today, My Top 100 Accounts etc]

To create **Views**,

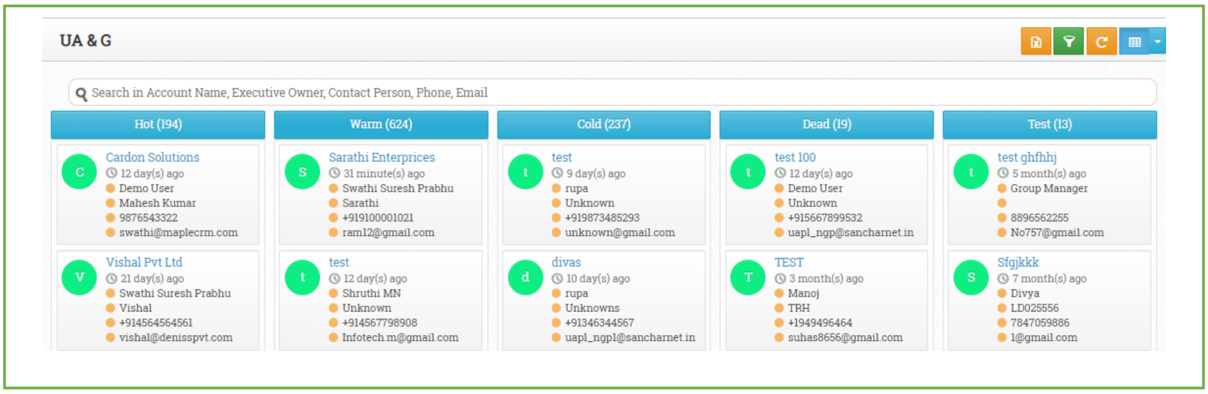
1. Click on **User name**

2. Click on **Settings**
3. Click on **View Settings** -> **My Views**
4. Click on **Add New View**
5. Enter **View name/Title**, **Classification Field** [mandatory for Grid View] and **Next**
6. User can give Additional Filter, Time Filer [optional]
7. Give **Actions** and **Select the fields** required in the view
8. Click on **Finish**.

Tabular View



Grid View



To View the **Custom Views,**

1. Click on **Account**-> **View name** which user has mentioned while creation from the left panel
2. From custom view page user can perform all the action by clicking on dropdown button next to Account number

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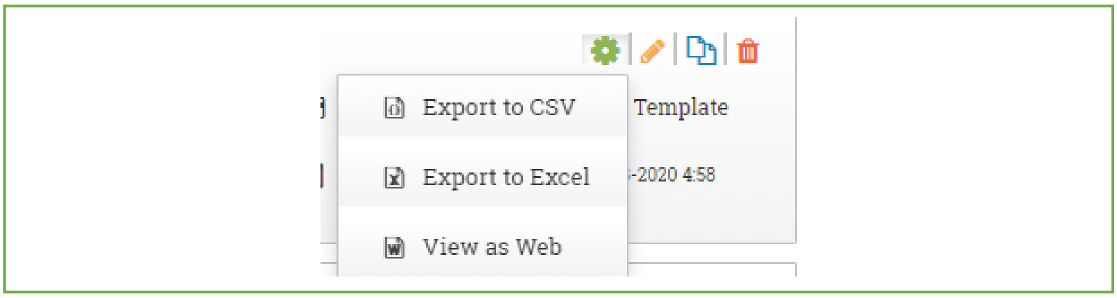
- ## How to run Accounts report?



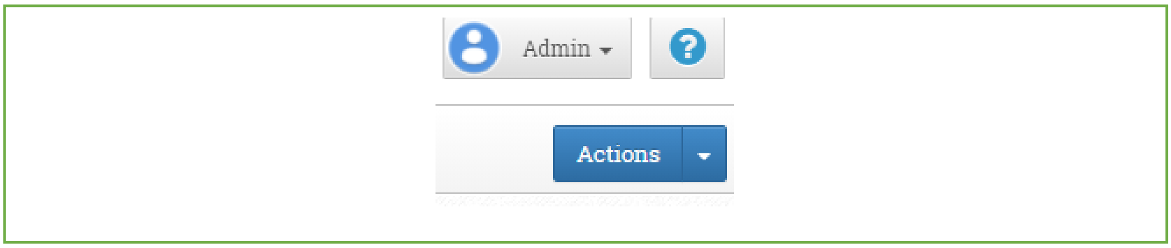
To download **Account Report**,

1. Go to **Reports -> Custom Reports**
2. Click on **New Report** and choose the context “ **Account**”
3. Give the **Time Period** filter [Ex: Added This Month] and additional filter condition [Ex: Status is equal to Open]
4. Select the field required in the report under **Select Field** option
5. Click on **Generate** from the right
6. User can export the data either to **CSV / Excel/View as Web**
7. User can also **Save this as Template** for future use

Note: Max 15 fields can be taken under Select Fields.
If the report result is more than 2000, then the report will be sent via mail to User.

- ## How to Delete an Account Individually?

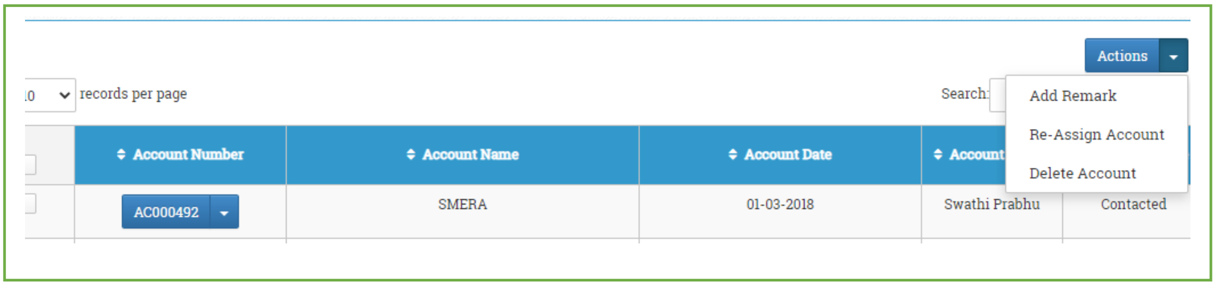
Description: Permanently deleting of Accounts can be done by the User who has “ Can Delete Accounts” permission under their User Type. Accounts can be deleted individually or in bulk.



To **Delete** Accounts individually,

1. Open the **Account** User wish to **Delete**
2. Under **Actions**, click on **Delete**
3. Delete option shall be visible only if User have the permission to **Delete**
4. All the **Open Reminders** must be closed then only the Accounts can be deleted.

- ## How to Delete the Accounts in Bulk?



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3. Give the 'records per page' User want. ie, 10/25/50/100 and click on below box [tick mark] ; so its selects the list
4. Click on 'Actions'(right side) and **Delete Account**