Customer & Deal Process User Guide

Customer Process:

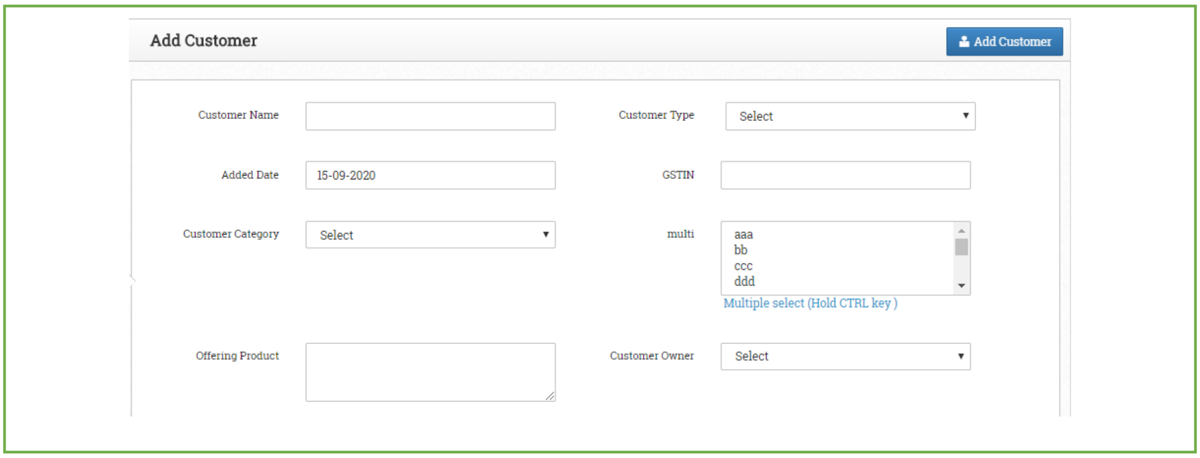
- ➔ How to Add Customer?
- ➔ How to Add Multiple Contacts under Customer?
- ➔ What are Remarks and How to add it?
- ➔ What are Reminders and How to add it?
- ➔ How to Add Documents?
- ➔ How to change the Customer Status?
- ➔ How to change the Customer State?
- ➔ How to change the Customer Category?
- ➔ How to Re-Assign Customer from one Owner to another Customer Owner individually?
- ➔ How to Re-Assign Customers from one Owner to another Customer Owner in Bulk?
- ➔ How to Send Mail in Customer?
- ➔ How to Send SMS in Customer?
- ➔ How to create Custom Views?
- ➔ How to Search for Customer?
- ➔ How to run Customer Report?
- ➔ How to Delete the Customer Individually?
- ➔ How to Delete the Customers in Bulk?

Deal Process:

- ➔ How to Add Deal?
- ➔ How to Add Multiple Contacts under Deal?
- ➔ What are Remarks and How to add it?
- ➔ What are Reminders and How to add it?
- ➔ How to Add Documents?
- ➔ How to change the Deal Status?
- ➔ How to change the Deal Type?
- ➔ How to Re-Assign Deal from one Owner to another Deal Owner individually?
- ➔ How to Send Mail in Deal?
- ➔ How to Search for Deal?
- ➔ How to create Custom Views?
- ➔ How to run Deal Report?
- ➔ How to Delete the Deal Individually?

- ## How to Add Customer?

Description: Customer are the converted Customers/ Old Customers where there is scope of either repeated orders or post services or can be both.

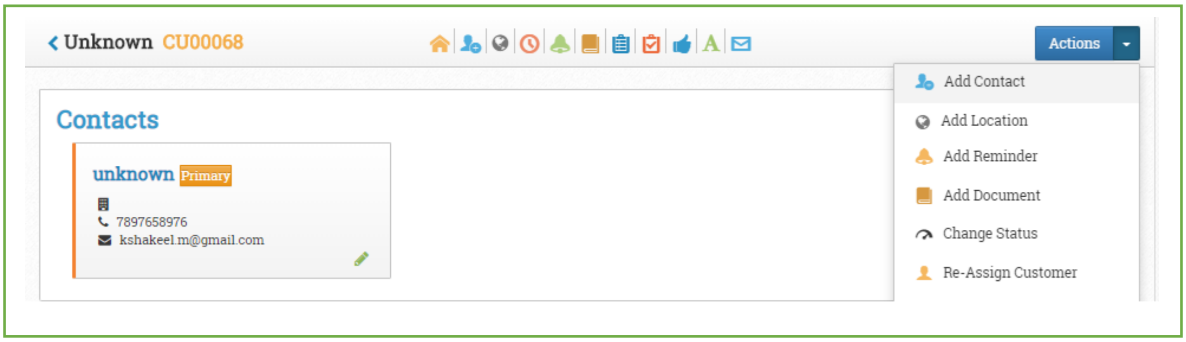


To **Add Customer,**

1. Go to the menu **Customers**
2. Click on **Add Customer**
3. Enter all the mandatory details
4. Click on **Add Customer**

- ## How to Add Multiple Contacts under Customer?

Description: User can add multiple contacts under each Customer.

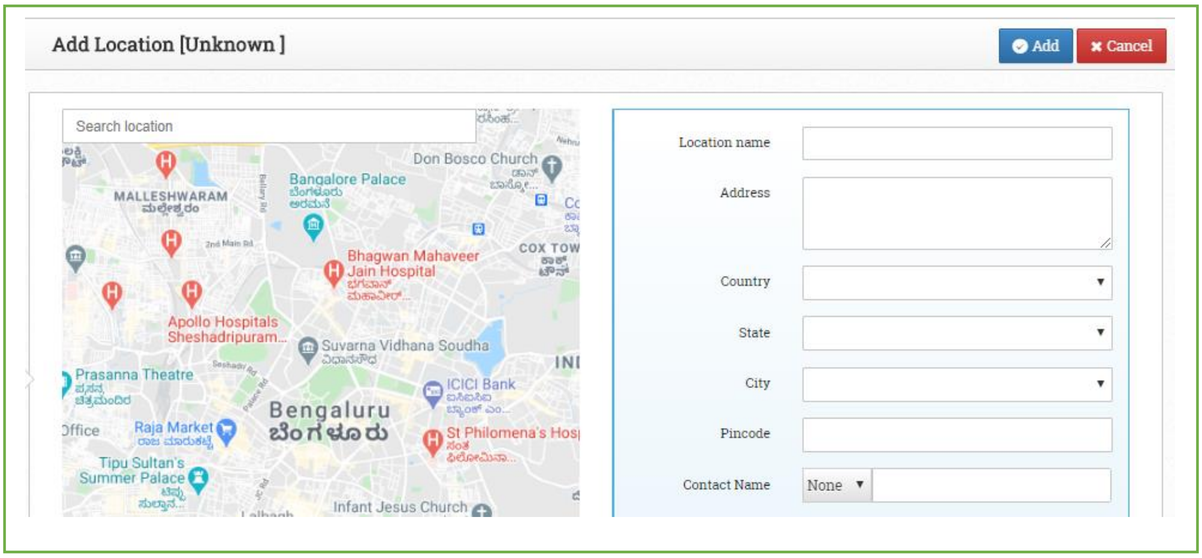


To **Add Contacts,**

1. Go to the menu **Customers** -> **Search Customer**
2. Open **Customer Manage page**
3. Click on **Add Contact** under **Actions**
4. Enter the **Contact Details** and Click on **Save**
5. All the added contacts will be under Contact menu [2nd blue icon in the top middle of the page]

- ## How to Add Customer Locations?

Description: Maple supports to add customer contact location details. This will help while product delivery/ during servicing.



To **Add Location,**

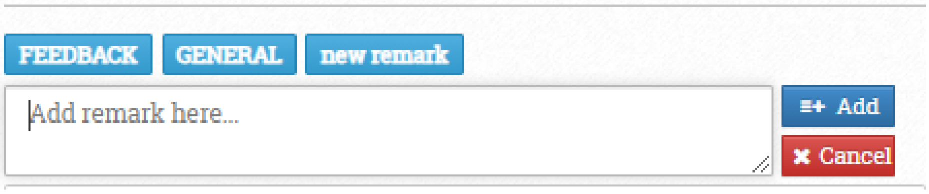
1. Go to the menu **Customers** -> **Search Customer**
2. Open **Customer Manage page**
3. Click on **Add Location** under **Actions** which is on top right
4. Enter the **Location details** and Click on **Add**

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

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

Remarks can be added in multiple ways:

- From Customer Manage page
- From Customer search page, next to Customer number dropdown - click on Add Note/Remark
- From Advanced Search, under Actions dropdown - click on Add remark

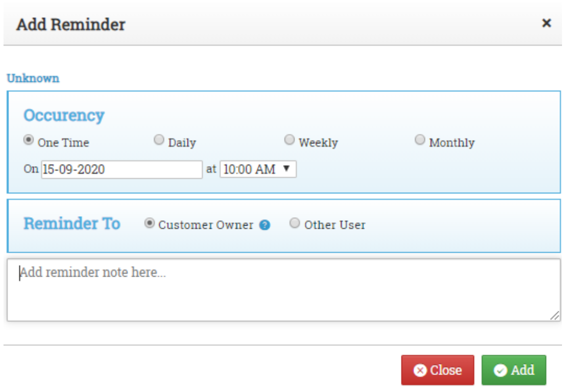


To **Add Remarks**,

1. Go to the menu **Customer** -> **Search Customer**
2. Open **Customer 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**

- ## What are Reminders and How to add it?

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



To **Add Reminder,**

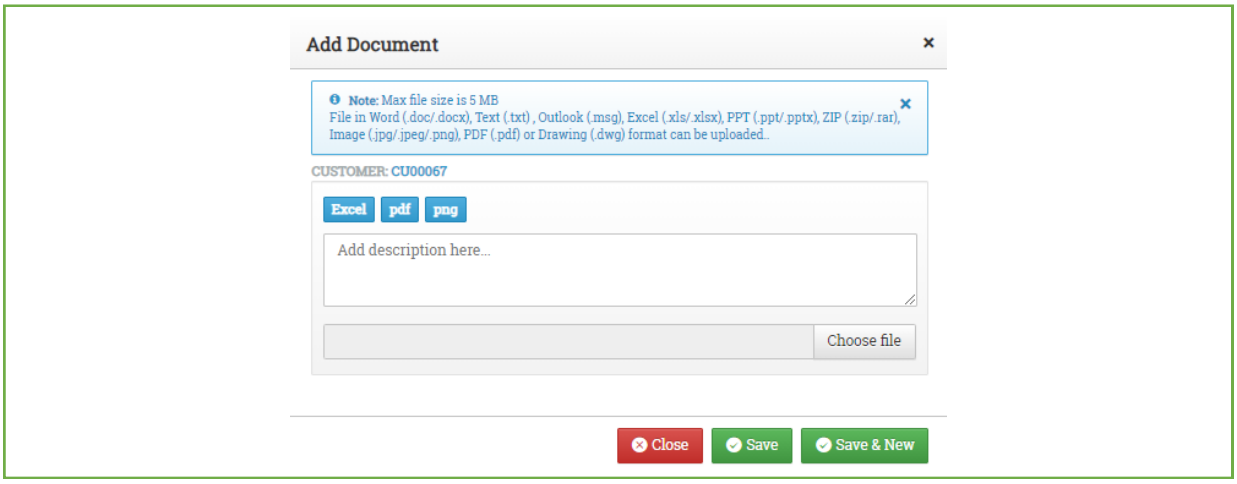
1. Go to **Search Customer**
2. Open the **Customer Manage** page
3. Click on **Add Reminder** under **Actions** which is on top right section
4. Select the Option of occurrence and the condition User want to set
5. Select the **date and time** for the reminder
6. Enter the **reminder note**
7. Click 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 the Documents?

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



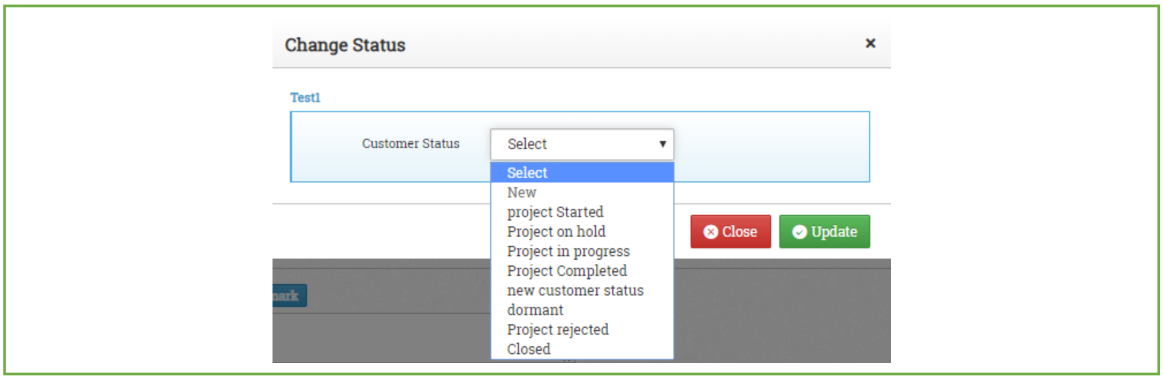
To **Add Documents,**

1. Go to **Search Customer**
2. Open the **Customer 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 Customer Status?

Description: User can change the status based upon Customer workflow defined in the system. (New->Contacted->document Submitted etc.)

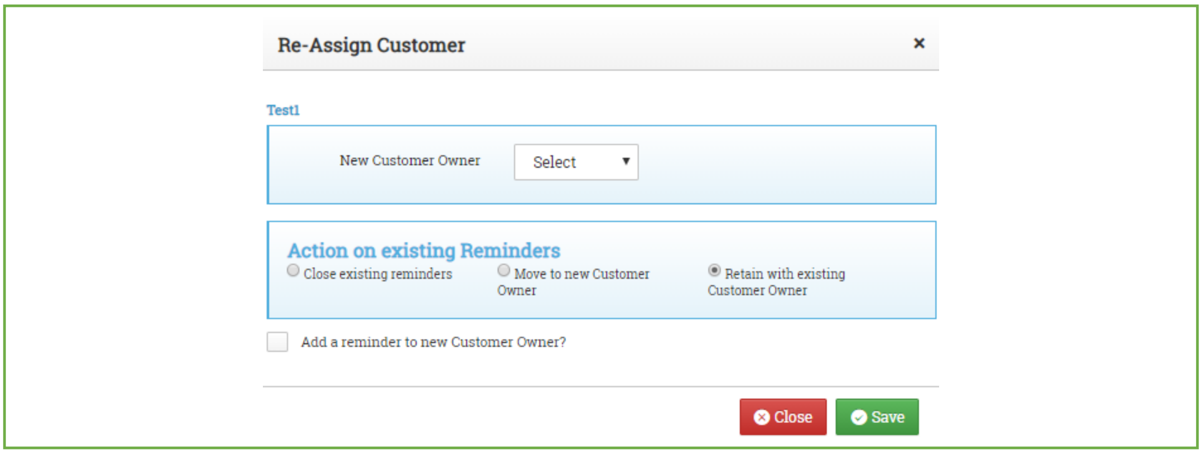


To Change **Customer Status,**

1. Go to **Search Customer**
2. Click on **Manage Customer** page from the drop down / double click on any Customer row
3. Click on **Change Status** under **Actions**
4. Select the **New Customer status**
5. Click on **Update**

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

Description: Customer 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 Customer**,

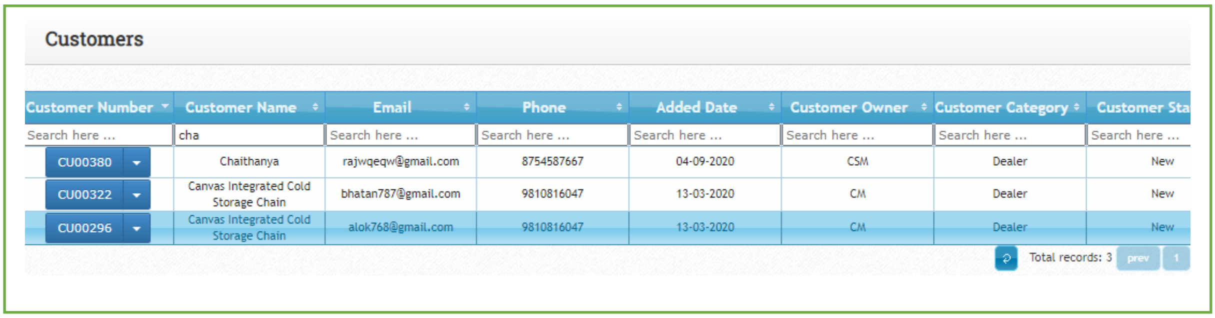
1. Go to **Search Customer**
2. Click on **Manage Customer** page from the drop down / double click on any Customer row
3. Click on **Reassign Customer** under **Actions**
4. Select the **New Customer Owner**
5. Choose the Action on Existing Reminders to move to New Customer Owner
6. Click on **Save**

- ## How to Re-Assign Customers from one Owner to another Customer 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 " Customer " and then give the conditions (such as Customer 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 Customer**
5. Select the **New Owner** and **Verify**

- ## How to Search the Customer?

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



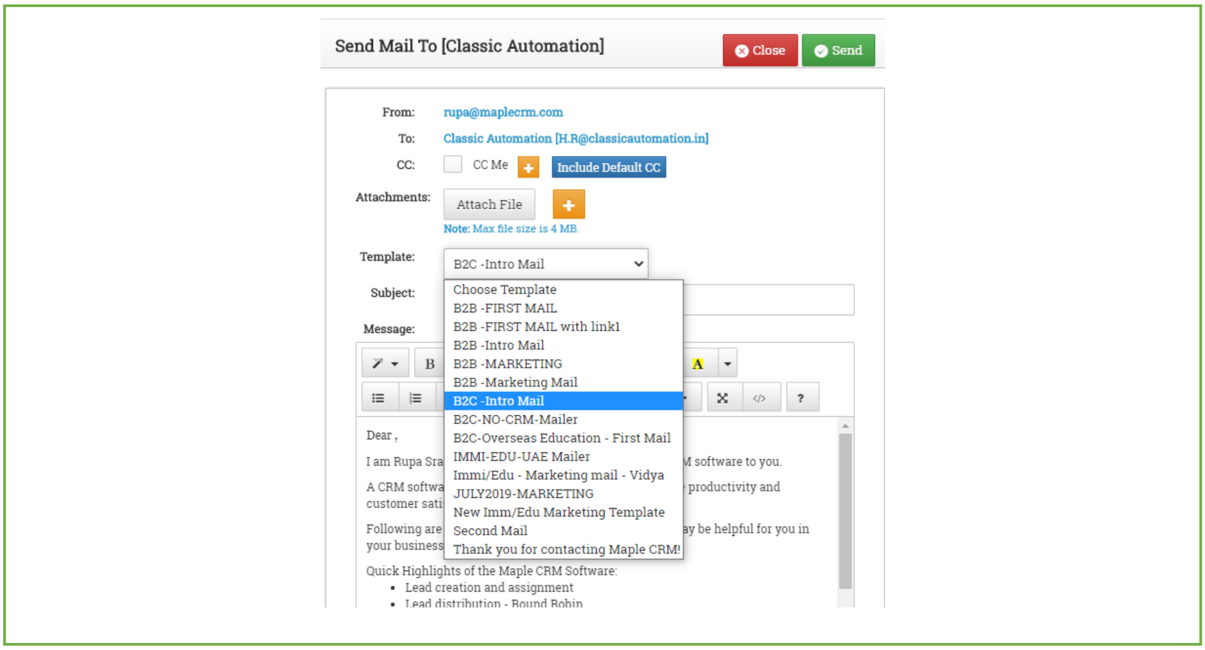
To **Search Customer**,

1. Click on **Customer** -> **Search Customer** 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 customers from the Search box on the top header. User can enter the input text directly and click on enter button.

• How to Send Mail?

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



To **Send Mail**,

1. Go to **Search Customer**
2. Click on **Manage customer** page from the drop down / double click on any customer row
3. Click on **Send Mail** under **Actions**
4. Choose the template
5. Click on **Send**

- ## How to Send SMS in Customers?

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

To **Send SMS,**

1. Open the **Manage Customer** page
2. Click on **Send SMS** under **Actions**
3. Select the **SMS Template**
4. Click on **Send**

- ## How to create Custom Views?

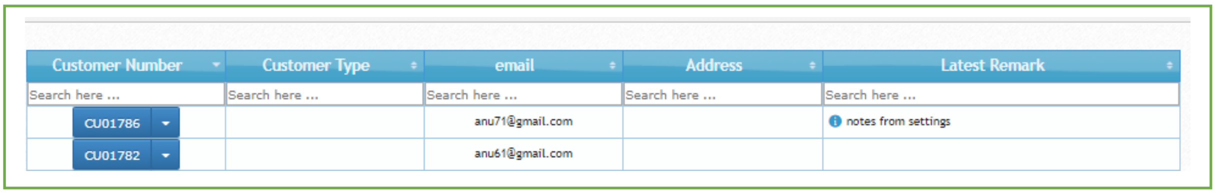
Description: User can create multiple custom views [Tabular /Grid] based on different conditions to check the updates easily. [Ex : Todays Update, , Customer Assigned Today, My Top 100 Customers etc]

To create **Views**,

1. Click on User name on top right section
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



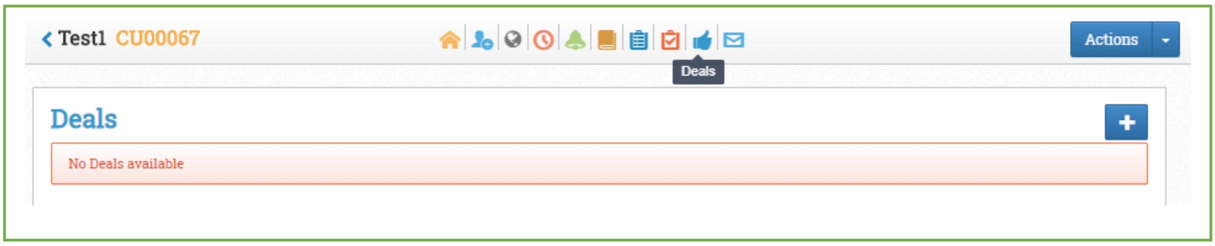
Grid View

To View the **Custom views,**

1. Click on **Customer**-> **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 Customer number

- ## How to Add Deal from Customer Page?

Description: The repeated orders from customer will be created as deals under same customer.

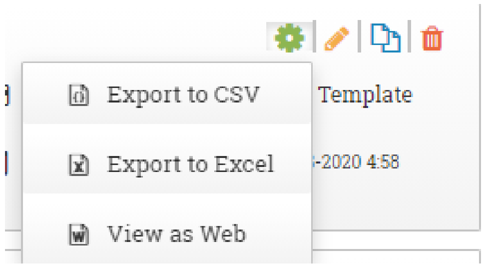


To **Add Deal,**

1. Go to **Search Customer**
2. Click on **Manage customer** page from the drop down/ double click on any customer row
3. Click on the **Thumb icon** in middle of customer page

4. Click on **+ icon** to add deal which is on top right section
5. Enter the mandatory deal details and click on **Finish**.

- ## How to run Customer Report?



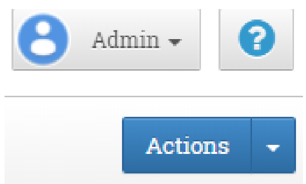
To download **Customer Report**,

1. Go to **Reports -> Custom Reports**
2. Click on **New Report** and choose the context " **Customer**"
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 a Customer Individually?

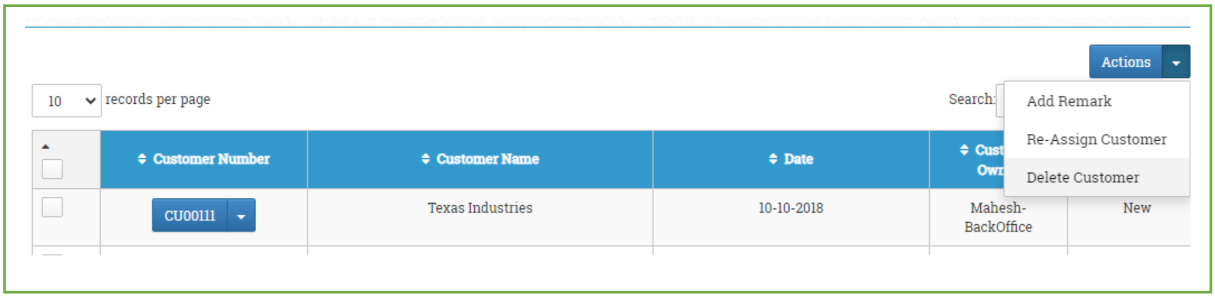
Description: Permanently deleting of Customers can be done by the User who has "Can Delete Customers" permission under their User Type. Customers can be deleted individually or in bulk.



To **Delete** Customers individually,

1. Open the **Customer** 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 Customers can be deleted.

- ## How to Delete the Customers in Bulk?

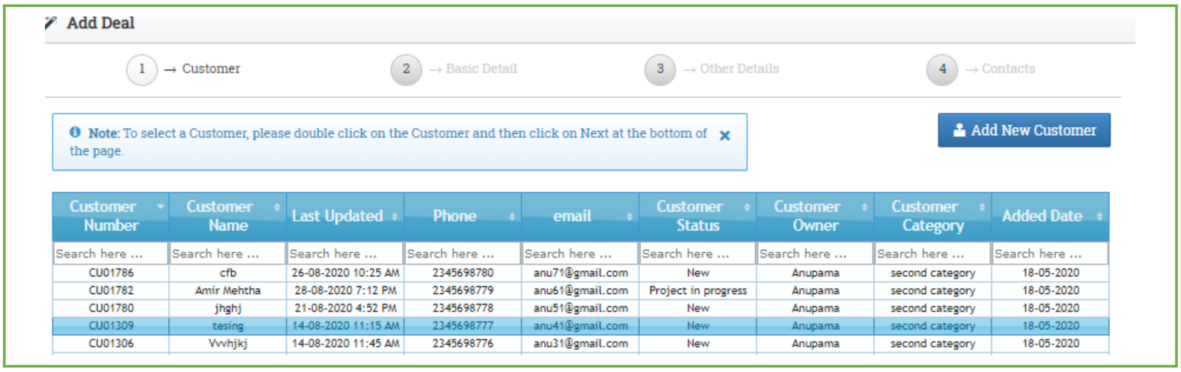


1. Click on **Search** button (Near to '+' symbol in top right of the page) and go to **'Advanced Search'**
2. In Search in, select the context " Customer" and then give the conditions (such as Customers Owner is XXX) and click on 'Search'
3. Give the 'records per page' User want. ie, 10/25/50/100 and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

Deal Management

- ## How to Add Deal?

  Description: The repeated orders from customer will be created as deals under same customer.

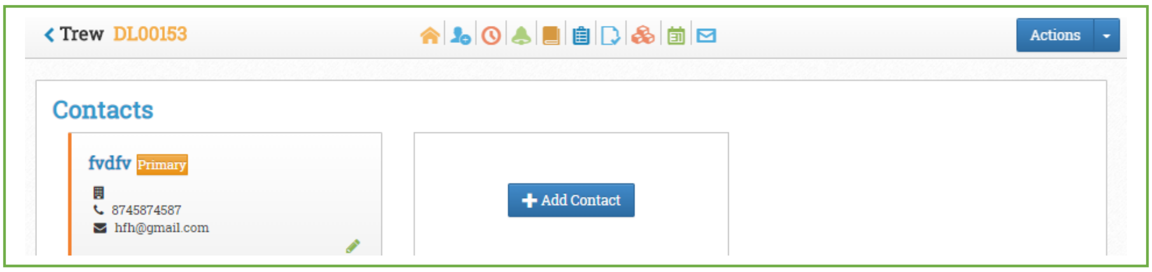


To **Add Deal,**

1. Click on **Deal** -> **Add Deal** from the left panel
2. Choose the Customer from the list
3. Enter all Deal mandatory details
4. Click on **Finish**

- ## How to Add Multiple Contacts under Deal?

  Description: User can add multiple contacts under each Deal.



To **Add Contacts,**

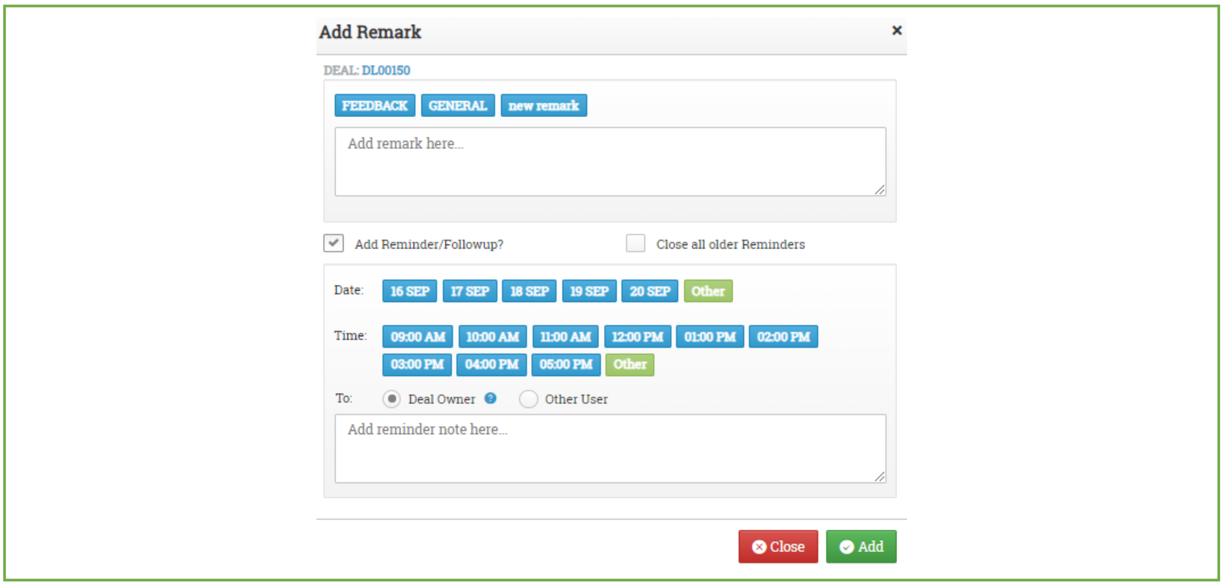
1. Go to the menu **Deals** -> **Search Deal**
2. Open **Deal Manage page**
3. Click on 2nd blue **Contacts** icon in the middle of the page
4. Click on +**Add Contact**
5. Enter the **Contact Details** and Click on **Save**

• What are Remarks and How to Add it?

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

Remarks can be added in multiple ways:

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



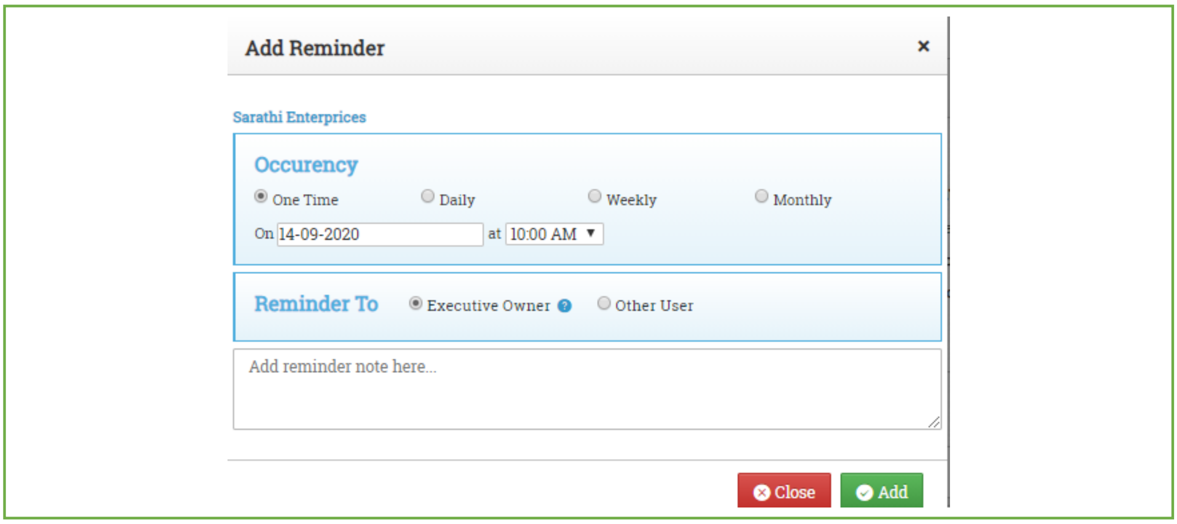
To **Add Remarks**,

1. Go to the menu **Deal** and click on **Search Deal**
2. Open the **Deal Manage** page

3. Click on **Add remarks** under **Actions**
4. Select the **Remark Type**
5. Click on **Add Remarks**
6. Enter the notes and click on **Save**

- ## What are Reminders and How to add it?

Description: For all the future follow-ups with the customer, all the Executive owner must have a mandatory reminder under every Deal.



To **Add Reminder,**

1. Go to **Search Deal**
2. Open the Deal **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**

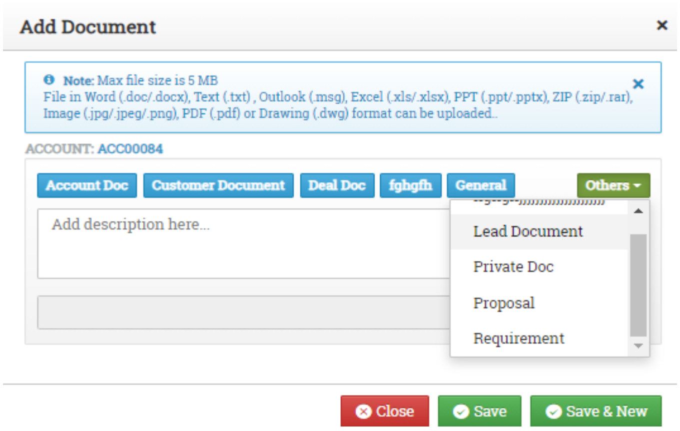
Note:

- All User Reminder will show 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 Customer related documents can be uploaded under every customer in the system.

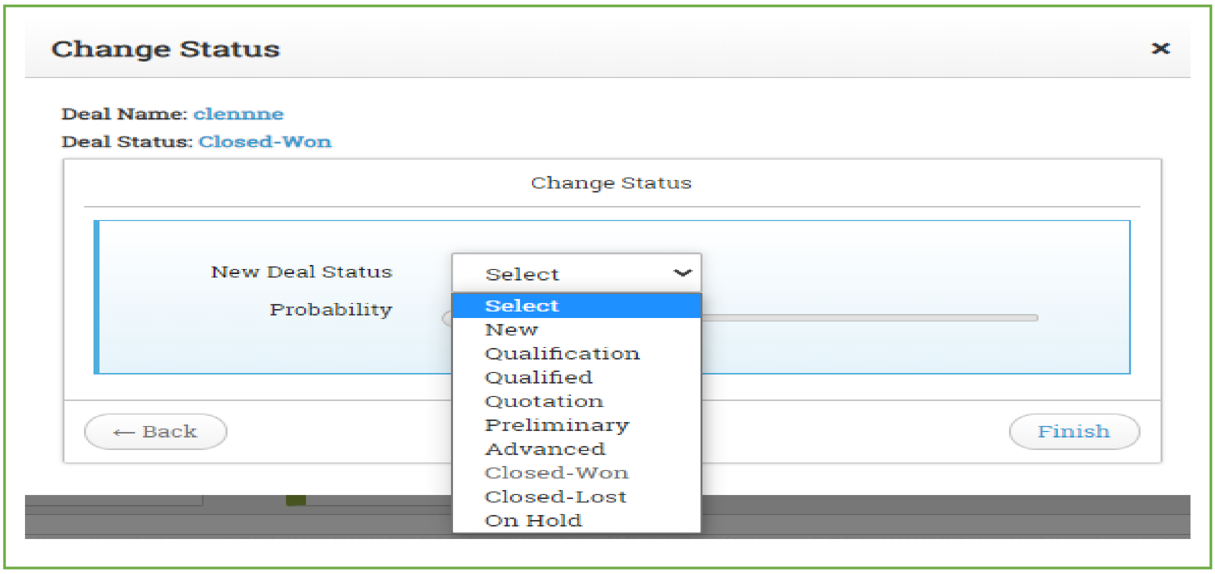


To **Add Documents,**

1. Go to **Search Deal**
2. Open the **Deal 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 the Deal Status?

Description: User can change the status based upon Deal workflow (New->Qualified->Quote Submitted etc.)

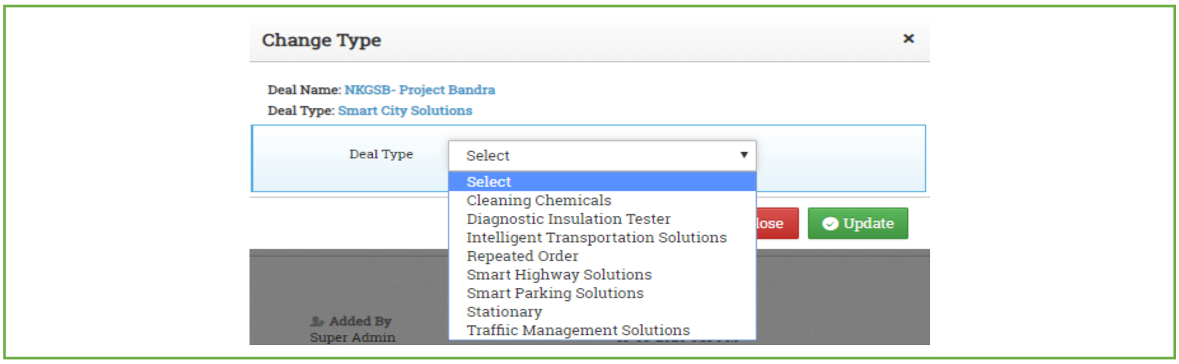


To Change **Deal Status,**

1. Go to **Search Deal**
2. Click on **Manage Deal** page from the drop down / double click on any Customer row
3. Click on **Change status** under **Actions**
4. Select the **New Deal Status**
5. Click on **Update**

- ## How to Change Deal Type?

Description: User can change the deal type if only the permission is enabled by Admin.

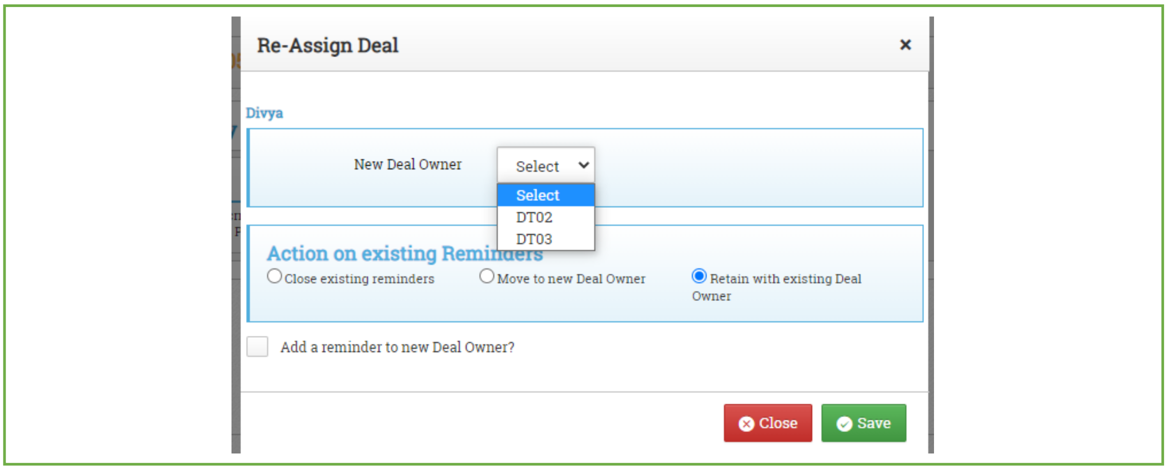


1. Go to **Search Deal**
2. Open the **Deal Manage page**
3. Click on **Change type** under **Actions** which is on top right section

4. Select the **Deal type**
5. Click on **Update**

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

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

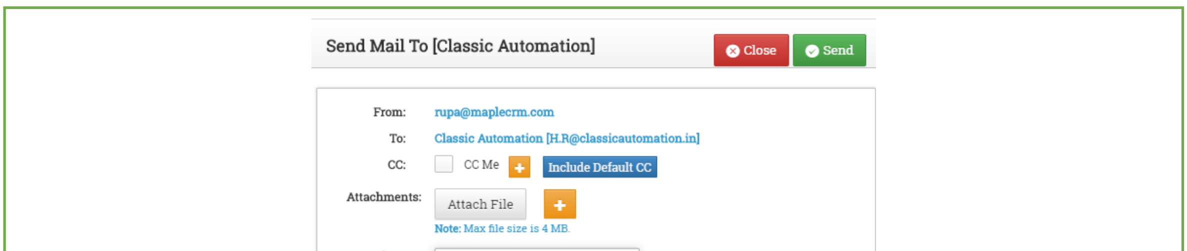


To **Re-Assign Deal,**

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

- ## How to Send Mail in Deal?

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

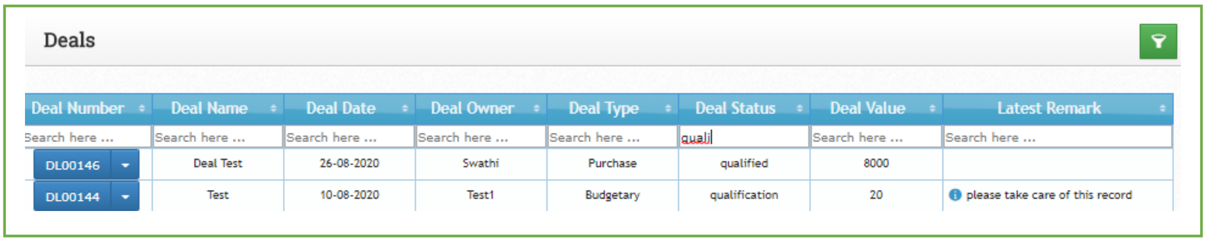


To **Send Mail**,

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

- ## How to Search the Deal?

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


Deals

Deal Number	Deal Name	Deal Date	Deal Owner	Deal Type	Deal Status	Deal Value	Latest Remark
Search here ...	Search here ...	Search here ...	Search here ...	Search here ...	quali	Search here ...	Search here ...
DL00146	Deal Test	26-08-2020	Swathi	Purchase	qualified	8000	
DL00144	Test	10-08-2020	Test1	Budgetary	qualification	20	please take care of this record

To **Search for Deal**,

1. Click on **Deal** -> **Search Deal** 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 Deals from the Search box on the top header. User can enter the input text directly and click on enter button.

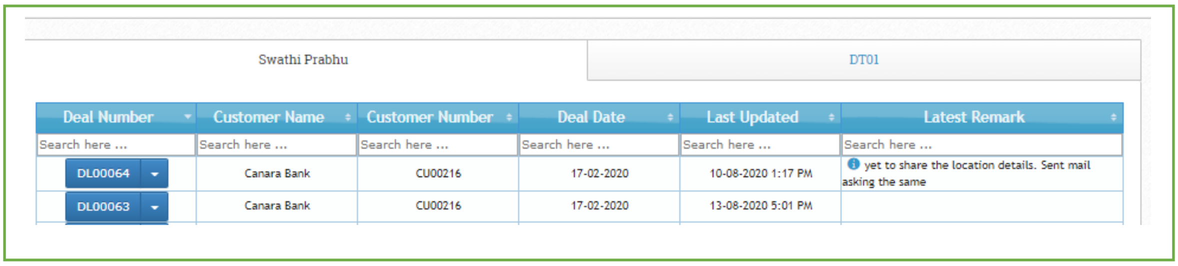
- ## How to create Custom Views?

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

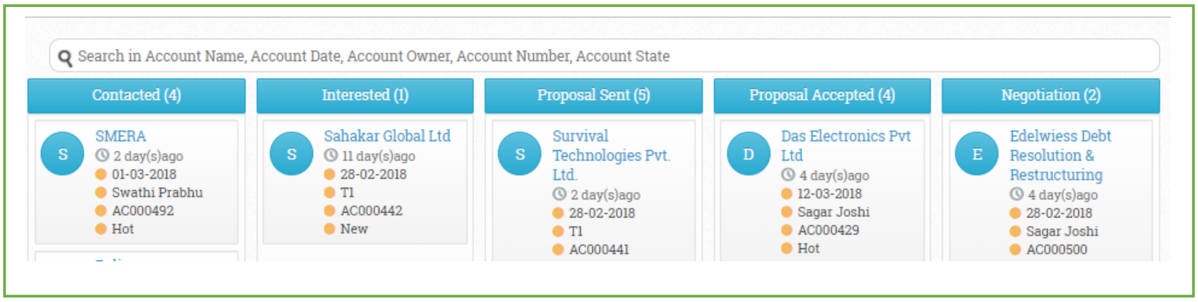
To create **views**,

1. Click on User name on top right section
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,

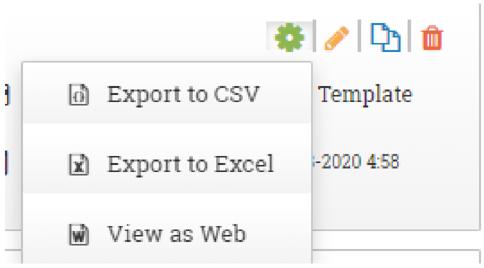


To View the **Custom views,**

1. Click on **Deal**-> **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 Deal number

- **How to run Deal Report?**



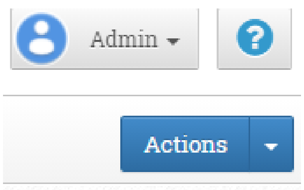
To download **Deal Report**,

1. Go to **Reports -> Custom Reports**
2. Click on **New Report** and choose the context "**Deal**"
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 a Deal Individually?**

Description: Permanently deleting of Deals can be done by the User who has "Can Delete Deal" permission under their User Type.



To **Delete** Deals individually,

1. Open the **Deal** 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 Deals can be deleted.