maple crm™

Quick Overview of Maple CRM

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- ## How to Login into CRM Account?

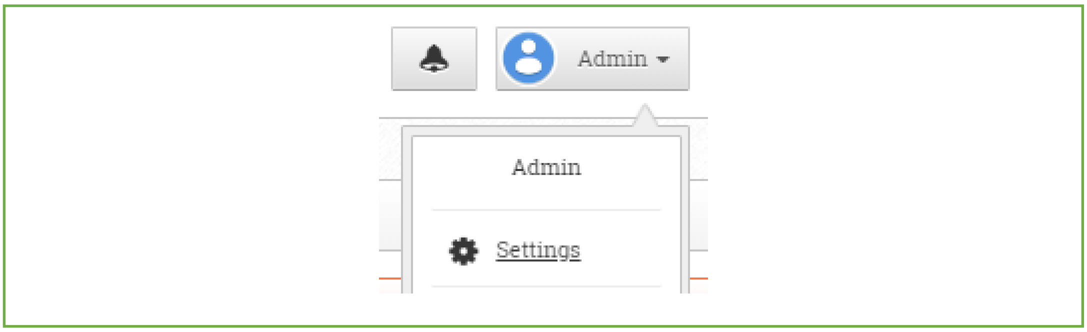
User would have received the login credentials through email when configured. Use these login credentials to log into Maple CRM system.

To login,

1. Click on the **Login URL** mentioned in the email
2. Enter User **Username** and temporary **password**
3. Click on **Sign In**

- ## How to Access Settings?

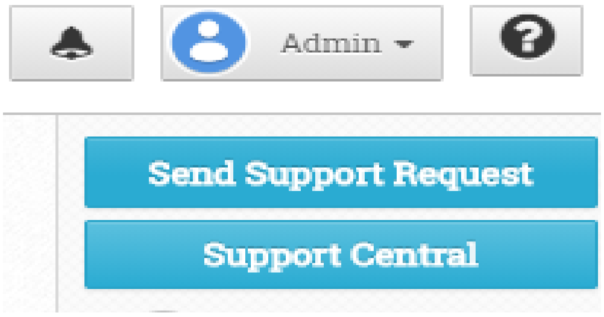
Description: CRM Admin can view/do changes required in the configuration. The **Settings** tab, groups together all the administrator functions that control User subscription, data, users, customisations and integrations.



1. Click on User name on the top right in the **Dashboard**
2. Click on **Settings**
3. User can see all the **Settings**; User, Configuration, Customize, View Settings, quotation, Invoice, Email and SMS etc features as per User **CRM Subscription package**

How to Send the Support Request/ raise a ticket to Maple Support Team ?

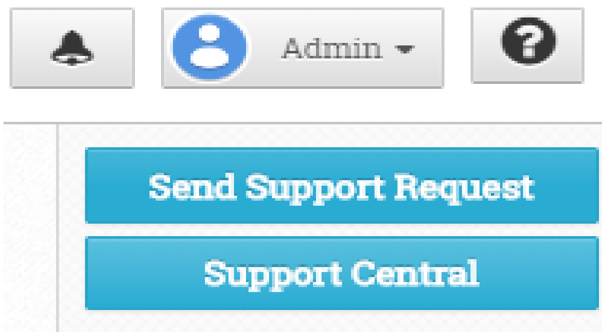
Description: All CRM Users can send all User queries or issues User are facing to Maple Support Team instead of using Gmail/outlook.



1. Click on **'?'** symbol on the top right in the **Dashboard**
2. Click on "**Send Support Request**"
3. Give the query note in **Subject** and details in the message body
4. User can attach the error page screenshot to give more clear clarity on the issue under **Attachments**
5. Click on **Send**

How to Access Support Central/User Guide?

Description: User can check the steps to perform any Actions which is not sure / don't know how to do it.



1. Click on **'?'** symbol on the top right in the Dashboard
2. Click on **Support Central**
3. Click on the context User want know the steps/details

- ## How to check My Work/ Today-Pending Tasks and status?

  Description: User can check todays follow-ups, Pending Tasks under My Reminders Tab.

  1. Click on **Reminders** tab on the left side menu
  2. Go to **My Reminders**
  3. Here User can check **Today's Task/Follow-up's, Pending and Scheduled Activities**

- ## How to check All User's Work/ Todays - Pending Tasks and status?

  Description: Admin/Manager can check his users todays follow-ups, Pending and Scheduled Tasks under Reminders tab.

  4. Click on **Reminders** tab on the left side menu
  5. Go to **All Active Reminders**
  6. Click on any **User Name**
  7. Here User can check **Today's Task/Follow-up's, Pending and Scheduled Activities**

- ## How to Add a New User?

  To Add a **User**,

  1. Log into CRM system as an Admin or Manager
  2. Go to **Settings** -> **User Settings** -> **Manage Users**
  3. Click on **Add User** icon on the top right
  4. In Login Details page, enter the following details:
     - **User Login ID**/Mail ID
     - **Password**
     - **Re-type Password**
  5. In Permission page, Select the **User Group** and **User Type** and choose the Access Level permission [Admin Permission /Group

Permission / End User (if both Admin and Group permissions are disabled)

6. In Personal Info page,
   - **First Name**
   - **Last Name**
   - **Address**
   - **Phone Number**
7. Click on **Finish** when User are done

Note : If User get message **"** User have reached the maximum limit for Users. Please contact Maple CRM Team to top-up the Users limit" then please send a mail to maple Support Team from Send Support Central.

• How to Add a User Type?

Description : Various User Hierarchy can be defined under User Types ; Admin, Manager, Executive , Accounts etc. This helps User to segregate the users under particular Type.

If any access permission [Ex: Can Generate Quotation] is enabled for User Type " Executive" the permissions will get applied for all users, belongs same user type.

To configure User Type,

1. Log into CRM system as an Admin
2. Go to **Settings** -> **User Settings** -> **Manage User Types**
3. Click on **Add User Type**
4. Enter the **User Type Name**
5. Enable access permission for the features a YES or NO
6. Click on **Add**

• How to Add a User Group?

Description : This is for grouping of Users ; may be based on Branches [Bangalore, Delhi etc] / Departments

User with Manager [or Group Permission] permission can access multiple groups/branches.

To configure **User Group**,

1. Log into CRM system as an Admin
2. Go to **Settings** -> **User Settings** -> **Manage User Groups**
3. Click on **Add User Groups**
4. Enter the **User Group Name**

How to Track Users Login History?

Description: This helps User to check every user Login -Logout time in CRM on daily basis.

To track user login history,

1. Log into CRM system as an Admin or manager
2. Go to **Settings** ->**User Settings** -> **Manage Users**
3. Click on drop down icon next to every user name
4. Click on **Login History** option

What is User Level Access?

Every User in CRM can be configured with the Access Level that defines the permission based on Hierarchy. Following are the four levels of Hierarchy

Admin: User who is enabled with Admin level can access the entire Maple CRM system.

Multi-Group Manager: User with multi-group level shall have access to two or more groups.

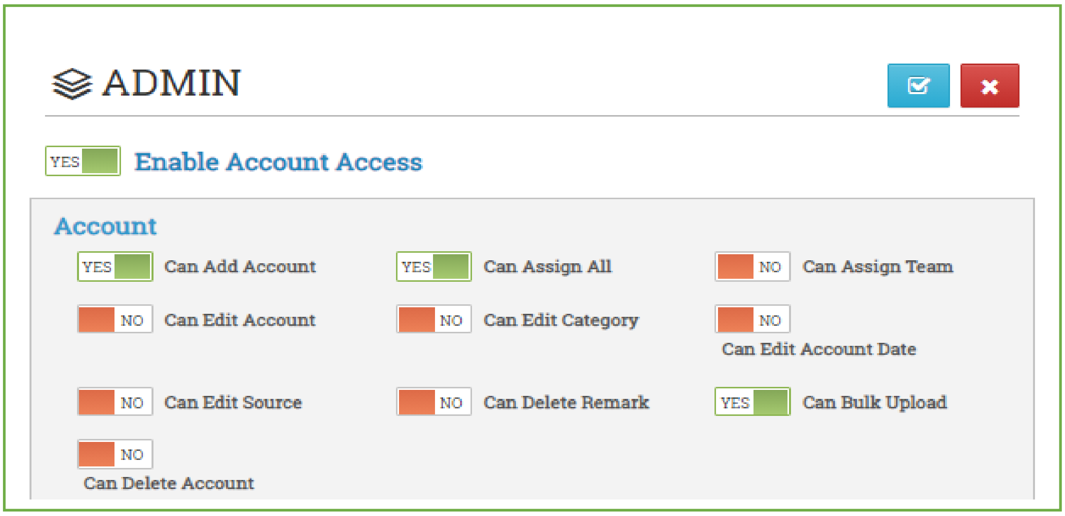
Group Manager: User with group level shall have access to only his group.

End User: User with End User level shall have access to only his accounts/customers.

How to Change/Define Permissions for a User?

Description: This is to change the user permission when User want to make an Executive to Manager or Manager to Admin or vice versa.

To change access permission,



1. Log into CRM system as an Admin or manager
2. Go to **Settings** - >**User Settings** -> **Manage Users**
3. Click on drop down icon next to every user name
4. Click on **Change Permissions**
5. Make appropriate corrections in the permission
6. Click on **Save**

Note: User can define permission initially when adding the user. To modify the user permission, User can use the above steps.

- ## How to configure Email Templates?

Description: User can have predefined Email Templates configured with macros, images, links, user signatures etc
While Send Mail to any Lead/Customer, User can just drag the appropriate template and Send it.
These templates can be used in Automation with different actions/conditions. [Ex: when new Lead is added, Intro mail to the lead]

To configure email templates,

1. Log into CRM system as an Admin

2. Go to **Settings**
3. Click on **Email Settings**-> **Email Templates**
4. Click on **Add Email Template**
5. Give **Template Name**, **Subject**
6. Select the appropriate **Category**
7. Draft the mail content in the body
8. User can use the **Macros** from the right panel if necessary [this will get replaced with actual value of Lead while sending mail]
9. Click on **Add**

- ## How to configure SMS Templates?

Description: User can have predefined SMS Templates configured with macros, links etc
While Send SMS to any Lead/Customer, User can just drag the appropriate template and Send it.
These templates can be used in Automation with different actions/conditions. [Ex: when new Lead is added, Registration SMS to the lead]
SMS can be Transactional /Promotional.

To configure SMS templates,

1. Log into CRM system as an Admin
2. Go to **Settings**
3. Click on **SMS Settings**-> **SMS Templates**
4. Click on **Add SMS Template**
5. Give **Template Name, Type , Subject**
6. Select the appropriate **Category and Base Template** (this will be configured by Maple Support Team)
7. Draft the SMS content in the body
8. User can use the **Macros** from the right panel if necessary [this will get replaced with actual value of Lead while sending SMS]
9. Click on **Add**

- ## How to configure different Remark Types?

Description: To give more clarity on the type of interactions done with Customer by any User, Maple supports to choose the remark type while adding feedback /notes every time.

1. Click on the User name on top right section
2. Go to **Settings -> Customize**
3. Click on **Remark Type**
4. Click on **Add** on right top option to choose the Context
5. Enter the **Remark Type** and default message[optional]
6. Click on **Add**

- ## How to configure different Document Types?

Description: To give more clarity on the type of documents added under each Lead/Customer/ any context by the any User, Maple supports to choose the document type while adding the files/ images.

1. Click on the User name on top right section
2. Go to **Settings -> Customize**
3. Click on **Remark Type**
4. Click on **Add** on right top option to choose the Context
5. Enter the **Remark Type** and default message[optional]
6. Click on **Add**

- ## What is an Activity and how to configure it ?

Description: To assign any task which are not particular to any lead/customer or to schedule any internal meeting with the team, User can add the Activity and include the users in it.

Activity will also have updates, status, follow-up reminders and expected time period to complete each activity.

1. Click on the User name on top right section
2. Go to **Settings -> Activity Settings**
3. Click on **Add Activity Type**

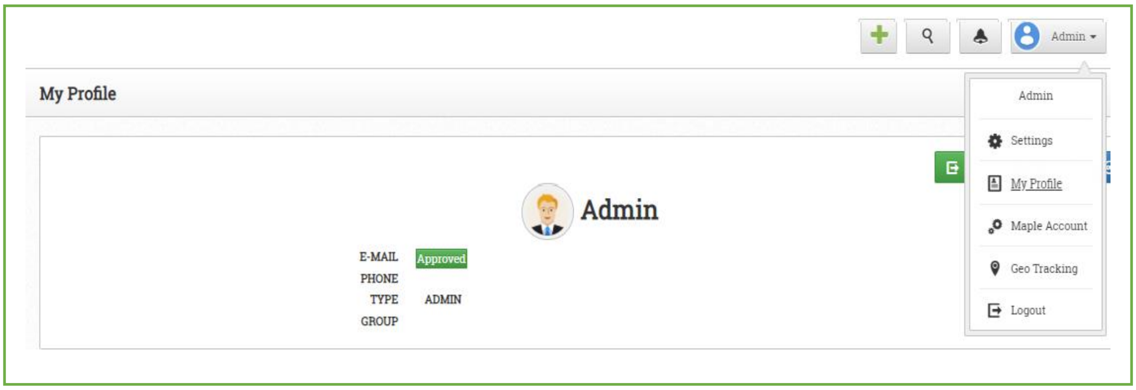
4. Select the **Context,** enter **Activity Type** name, **TAT**
5. Click on "**On Create Actions "** to add auto reminder **"Add Reminder to Activity Owner"**
6. Click on **Add**

User Management Guide

- ## How to verify User Email ID?

Description : Every User must verify their Mail ID soon after they first login to CRM. Only after this mail verification they can Send Mail from CRM. This Mail verification is to create a connection that whenever a user send mail from CRM will be sent from user mail id.

To verify User email address,

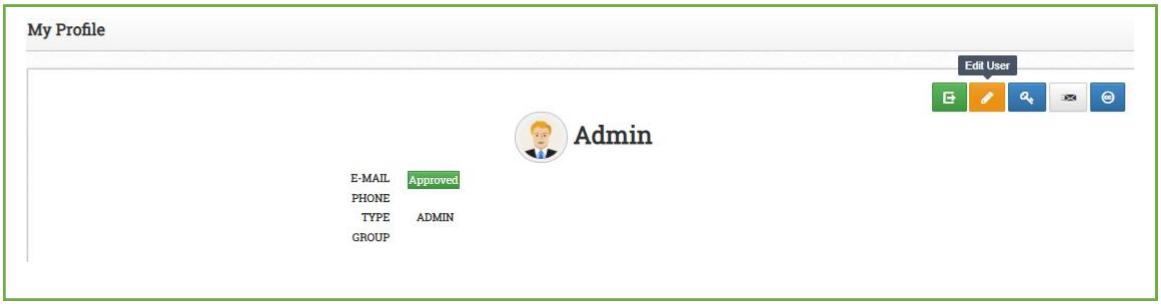


1. Click on User name on the top right section
2. Click on **My Profile**
3. Click on **Verify Email** icon on User email address
4. Enter the verification code User have received along with the login credentials and click on **Verify**
5. If the verification code has expired, then click on **resend verification code** and get a new code to enter

- ## How to Edit User Profile Information?

Description : User can modify the CRM profile details like Name, Address, Phone, Primary Email Id.

To update User profile details,



1. Click on User name on the top right section
2. Click on **My Profile**
3. Click on **Edit User** icon
4. Modify the required fields
5. Click on **Update**

- ## How to configure User Signature?

Description: User can configure the mail signature. While Sending mail , if the email template has the macro %Signature% in it ; this will get replaced with the logged in user signature.

To Configure the signature,

1. Click on **Settings**-> **User Settings**->**Manage Users**
2. Click on drop down icon next to every user name
3. Click on **Edit Signature**
4. Copy User Signature, click on **Update**

- ## How to Reset the User Password?

Description: Every user will receive Temporary Password when the mail id is first configured in CRM. Later User can change this to different permanent password.

To reset User password,

1. Click on User name on the top right section
2. Click on **My Profile**
3. Click on **Reset Password** icon
4. Enter User **Current** and also the **New Password** and click on Reset

- ## How to Add Additional Mail Id's?

Description: User can add User multiple Mail id's ; while User Sending Mail to lead/Customer from CRM Account, user can able to pick the mail id's under From option.
All these mail id's also need to go through the Mail ID Verification Process.

To Add **Additional Mail Details**,

1. Click on User name on the top right section
2. Click on **My Profile**
3. Click on Add **Additional Mail Details** Icon
4. Click on **Add Additional Email**
5. Enter the Name, Email id, Click on **Add**
6. This id's follows same email id verification process

- ## How to Add Default CC's?

Description: User can configure multiple mail id's here which user want to include as CC every time User send mail from CRM.

1. Click on User name on the top right section
2. Click on **My Profile**
3. Click on Add **Default CC List** Icon
4. Click on **Add Default CC**
5. Enter the Name, Email id, Click on **Add**

Note : User have to click on " **Include Default CC**" option while Send Mail so all the default CCs get added to that mail.

Dashboard Setup

- ## What is CRM Dashboard ?

Dashboard helps User to monitor sales, overall business opportunities, processes, and performance. Often set to provide information in real time, CRM dashboards offer business intelligence to help professionals measure, analyse, and act on meaningful, actionable data.

Dashboard can have different Charts [Pie, Donut, Funnel, Bar and Stack] based on the context accessible to every User.
There will be Default Charts and every User can also create and add charts to his Dashboard.

- ## How to Access My Dashboard?

Description: To access the custom, default charts or add new charts/delete.

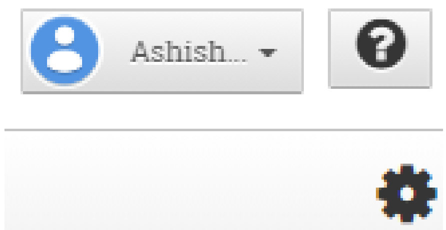
To Access to **Dashboard**,

1. Click on the **Dashboard** [monitor icon], which is left side of the Main page
2. Click on any chart which will take to its result page
3. Click on **back button** on top left to come back from **Dashboard**

- ## How to Add New Item/Chart into Dashboard?

Description: Every User can add/delete the custom and default Charts to his Dashboard

To Add New Item into **Dashboard**,



1. Click on **Dashboard** icon on top left side of main page

2. Click on **Gear Icon** on right top corner
3. Click on **Add Item**-> **Create New**
4. Choose the **Chart Source**, **Chart Name**, **Chart Type**
5. Click on **Add**

Note: User can also add charts to dashboard from charts directly.

Charts and Views

Charts and Custom Views allow User to visualize User data in real-time so that User can make better decisions faster. Charts are a widget type on a dashboard, and pull directly from User sheets and reports to display trends and metrics in User live data.

• How to create Charts?

To create the **Charts**,

1. Click on **Charts** from left side menu in the Dashboard
2. Click on **Add New Chart** on top right
3. Select the context and chart type
4. Enter **Chart name/Title**, **Classification Field** and **Next**
5. User can give Additional Filter, Time Filer [optional]
6. Give **Actions** and Select the fields required in the chart result page
7. Click on **Finish**
8. Click on tick/right icon [**Add To Dashboard**]

• How to Add Charts to each User Dashboard?

Description: Every User can add/delete the custom and default Charts to his Dashboard

To Add Charts to **Dashboard**,

1. Click on the **Charts** in the left side menu in Dashboard
2. Click on the context
3. Click on **tick mark** shown at right side of chart name
4. If User want to remove it from **Dashboard**, click on same tick mark to disable it

- ## How to rearrange the Charts in order?

Description : User can rearrange/reorder the Charts in his Dashboard.

1. Click on **Dashboard** icon on left side of main page
2. Click on **Gear Icon** on right top corner
3. Re-arrange the charts by drag and drop
4. Click on Back to **Dashboard** on top right

- ## How to create Custom Views/ My Views?

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

- ## How to Add/Delete fields in Search View page for any context?

Description: In search view page where User can perform all the actions if User want any fields to add or filters to be applied User can do under search view settings.

To change the fields in **Search View Settings**

1. Click on User name on top right section
2. Click on **Settings**
3. Click on **View Settings**->**Search View Settings**
4. Select the context
5. To add new field, click on the field under "**Lead / Account/ any other Customer Attributes**" in left side field listing and **Save**
6. To remove any field, click on **cross button** in right side field listing and **Save**
7. To reorder the fields in the view, User can drag and drop the fields in the right side "**Selected Field "** listing

- ## How to create User Type Views?

Description: If User want to create a view which must be visible to all the Executives in the CRM, then instead of adding the view to Each User, User can choose the User Type " Executive" and create the view.

To create **User Type Views**,

1. Click on User name on top right section
2. Click on **Settings -> View settings -> User Type Views**
3. Select the **User Type and** click on **"+**" icon shown in right side
4. Choose the **Context** and **View Type**
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**

Note: These view will show to all users who belong to that User Type and listing of Leads/Accounts/Customer is based on their access permission. User type views can be created by only **ADMIN**

Data Manager

- ## How to upload the Existing Lead/Customer/Deals Data into Maple CRM?

Description: User can import all User older leads/ customers into the CRM by below steps.

To import data,

1. Click on **Data Manager** option from left menu in the Dashboard
2. Click on **Bulk Upload** Leads/Accounts/Customer/Deal
3. In **Choose Data File** page, select the csv file that User want to upload from local computer
4. In **Select Fields**, map the Field Names in CSV file with Field Names in Maple CRM
5. In **Verify** page, select the date format used in the csv file and also check the box(country code part of phone number?)if phone number field contain country code with prefix, and other mandatory field values required for upload
6. Click on **Upload**
7. User can Ignore the fields which is not required to upload
8. Click on **Submit**

Note :

- All the fields in CSV must be configured in User CRM system before bulk upload; this is required while mapping fields in CSV with fields in CRM
- Field Values in CSV must match exactly the values configured in CRM for List and Multiselect fields
- All the Date fields in CSV must be in same format
- Valid Email id and 10 digits Phone number is mandatory
- Owner column must have User CRM login id and not User Name
- Once Uploaded, system will show how many are uploaded and how many are not.

Leads which are not uploaded will be in Error File on same page which User can download, correct the error shown in last column and can be reuploaded.

- ## How to upload Lead/Account data with and without Country Code?

With Country Code:

1. User can include **country code** in **Bulk Upload** for Accounts/Leads
2. In two different ways the country code can be added;

   Method 1 : Include the Country code along with Phone number in the same field in the CSV file.
   Start with Prefix with country code**<space>**Phone number
   (Ex: +91 9876543210)

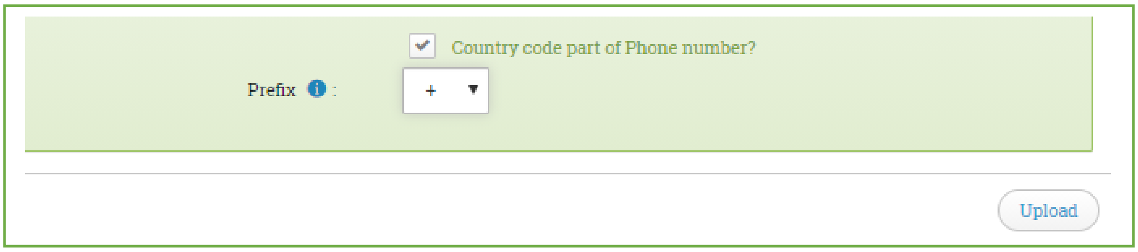
   Method 2: Have 2 separate columns in the csv file; one for Country Code and other for Phone number.

   Example:

Country Code	Phone Number
91	9848986754

Without Country Code:

User have to untick the “Country Code part of Phone Number?” in the 3rd page while Bulk upload. It can be a 10-digit number or number with country code.



Notes:

- Uploading data, **country code with Phone number** field itself, make sure to check the box (**Country Code part of phone number?)** in verify page.
- Uploading data, country code and phone number in 2 **separate columns**, make sure in select fields, map the field name country code in CSV file with the Maple field Name Country Code.
- Uploading data without any country code, no need to check the box (country code part of phone number?) in verify page (ex: 9909090909)

- ## How to bulk upload the Product and Services into CRM?

Description: Maple supports User to add all the products and service either individually / by bulk upload in the system.

To **Bulk Upload Product/Services** ,

1. Click on **Data Manager** option from left menu in the Dashboard
2. Click on **Bulk Upload Products**
3. In **Choose Data File** page, select the csv file that User want to upload from local computer
4. In **Select Fields**, map the Field Names in CSV file with products field Names in CRM
5. Click on **Upload**
6. User can Ignore the fields which is not required to upload
7. Click on **Submit**

Note:

- User can also add additional fields for specifications by clicking on the custom attribute under Product Settings
- User can also add additional tax components by clicking on tax components under product/Service settings
- Same steps to be followed to **Add Services** under **Service settings.**

- ## Where to store all the miscellaneous documents related to Admin's Company/ Product/Service?

Description: Maple supports User to store all the documents related to the company/product/service in the CRM which can be accessible by other users as per the View permission while adding the document by the User.

User can take this document while Sending mail to lead/customer directly from the system. [While Send mail , choose “Attach from Document Base”]

1. Click on **Data Manager** option from left menu in the Dashboard
2. Click on **Document Base -> Add Document**
3. **Select Document Type, Document Name, Visible To and description**
4. Choose the file from local computer
5. Click on **Add**

- ## What is Image Gallery and where it is used?

Description: Maple supports User to add directly add images from local computed and save in CRM.
There images can be used in User Signature/ Email Templates.
User has to “ **Copy Image URL** “ while attaching the image.