maple crm™

Report Configuration & User Guide

Description: Reports being the key component in Maple CRM, allows companies to understand the customer data and provides clear visibility of customer related activities through its various reporting options.

Report Settings:

- What is the use of Reports and different types?
- How to run a Report/ Export data from CRM?
- How to Add Report Templates for any Context?
- How to edit the Report Template?

• What is the use of Reports and different types?

Reports can be customized and made automated to Admin/Managers to check the leads/customer status, sales value, expected conversions, total won and lost cases etc. Below are types of reports,

Custom Report :

Custom Reports are basically customizable reports that can be used to generate report on any time period and additional report filter conditions. User can choose what columns (data fields) that User would like to have in the report and apply various filters (conditions) to generate report. Multiple filter conditions can be added and the report can be generated as web report or can be downloaded into CSV or Excel file.

Summary Report :

These reports give the overall summary/count of a particular context ; Leads/Accounts/ Customer/Deal.

[Ex : Lead Source v/s Lead Owner with report filter 'Leads Added Today' gives the total Leads added by each User against each Source today.

Analytics Report [Only Leads Context] :

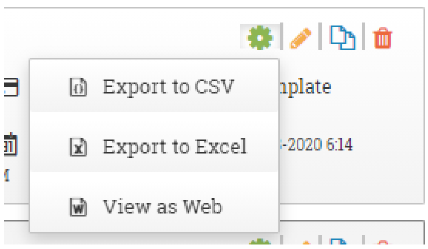
This report gives the real time lead status change done by the Users for different time period.

Report Templates

Additionally, User can make use of Report Templates to save the Custom Reports so as to eliminate repetitive tasks. The saved report templates will be available under Report Templates listing context wise from where the reports can be downloaded.

- ## How to run a Report/ Export data from CRM ?

To **export** data from **report**,



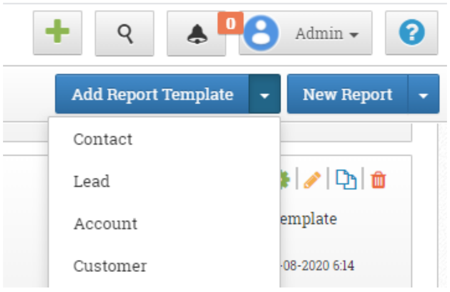
1. Go to **Reports -> Custom Reports**
2. Click on **New Report** and choose the context that User wish to download from Accounts/Leads/Quotations etc
3. Give the **Time Period** filter [Ex: Expected Conversion This Month] and additional filter condition [Ex: Lead Status is equal to Quote Accepted]
4. 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 sent via mail to User.

How to Add Report Templates for any Context?

Description : User can make use of Report Templates to save the Custom Reports so as to eliminate repetitive tasks. The saved report templates will be available under Report Templates listing context wise from where the reports can be downloaded.

To add a **Report Template**,

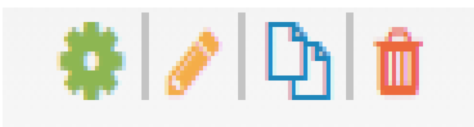


1. Go to Reports -> **Report Templates**
2. Click on **Add Report Template** for either Accounts/Leads/Quotations
3. Set the **Time Period** for the report if needed
4. Enter a **Report Name** and **Description**
5. Mark the **Order by** option to sort the data based on **Ascending** or **Descending** if needed
6. Configure **Report Filters** for Conditions
7. Include multiple conditions as needed
8. Select the **Report Fields** which needs to be shown in the report as columns
9. Click on **Add**.

Note: User can create different type of reports with different conditions and time filters.

How to edit the Report Template?

Description : To edit any **Report Template** , change the conditions and run it , User can follow the below steps.



1. Click on the **Report** in main page
2. Choose the context of report User want to edit
3. Click on **edit icon** on right side
4. Once the changes is done click on **Update**.

Note: If User want to Create New report with same conditions and filters with different report name/ different additional conditions User can click on 3rd icon **Clone,** Enter the New Report name & Click on Add.