Lead Configuration User Guide

Description: Admin can configure/do changes in the following; Adding/Deleting new lead field, rearranging, add new leads source, lead workflow under Lead Status, Lead Scoring etc.

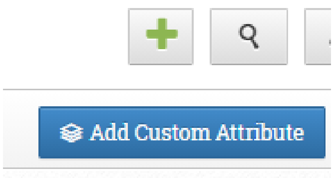
Lead Settings:

- How to Add Lead Custom Attributes?
- What are the different Data Types and How it Works?
- Lead Form Configuration Settings
- How to Configure Lead Score Rules?
- How to Add Lead Source?
- How to Add Lead Sub Source List?
- How to Add Lead Status and Define Sequence?
- How to configure Lead Status Rule?
- How to Add Lead Status Dependency List?
- How to Delete the Lead Individually?
- How to Bulk Delete the Leads?
- How to Bulk Reassign Leads?
- How to run a Lead Report?
- How to add Lead custom tables?

• How to Add Lead Custom Attributes?

Description: Lead fields are called as Lead Custom Attributes**.** These can be added with different data types [Ex: Text box, List , Date field etc]

To Add **Lead Custom Attribute**



1. Go to **Settings** -> **Lead Settings**-> **Custom Attribute**
2. Click on **Add Custom Attribute**

3. Give the **Attribute Name**, select the **Data Type**
4. Click on **Add**
5. To add this field to 'Lead Form', click on **Form Configuration**
6. Click on the attribute under **Lead Attribute** listing which will get added under **Selected Fields [** click on Edit green icon to make this field as Mandatory**]**
7. **Save Configuration**

Note: User can set dependency for this attribute.

1. Click on **Attribute** User want to set **Dependency**
2. Click on **2nd blue icon** called **Update Dependency**
3. Choose "Show this attribute only when" and 'Is set to' ; click on + icon
4. Click on **Save**.

- ## What are the different Data Types and How it Works?

Description: Each data field is defined by its data type ; whether it is String/ List/Date/Multiselect/Number field.

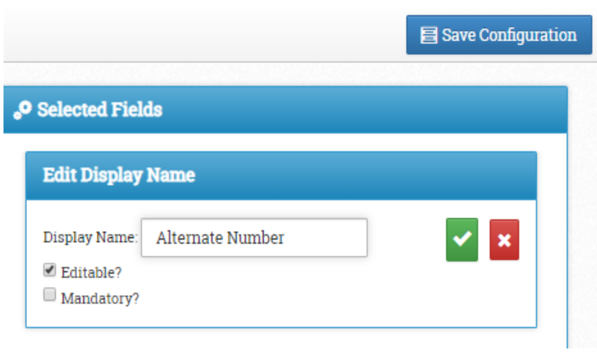
There are 6 different Data types are available,

1. **String**: String/Text box where all characters are allowed. User can give the Max data length supported [Ex: GSTIN : 15 characters]
2. **Date**: The default Date can be fixed (If any)
3. **List**: Allows to choose only one value in the field. Values can be arranged in Ascending / Descending / Re-Order under **Order List Values** [sky blue icon] option . Click on **Edit** [orange icon] option to enter new values whenever required.
4. **Multiselect List**: Allows to choose multiple values in the field. Values can be arranged in Ascending / Descending / Re-Order under **Order List Values** [sky blue icon] option . Click on **Edit** [orange icon] option to enter new values whenever required.
5. **Number**: Allows only number values. User can define a Min & Max Values
6. **Number With Decimal**: Allows only number with decimal values [Ex: 1.1] .User can define Min & Max Values

Note: Data Type of the field cannot be changed at any point of time. Only way is to force delete that field and re-add it. Here, we will check whether this field is in use under any Leads/Accounts/Customer/Deals. By force delete, all values will get deleted and user has to re-add the values once the field is re-added.

- ## How Add/Delete field in Lead Form, Rename the field, Reorder the field, Mandatory/Non-Mandatory, Editable/Non Editable in Lead Form Configuration

Description: Maple lets User to customize the Add Lead form page as required. User can customize the field names, order in which the field has to appear in Lead Form. The same shall be reflected in the Lead Manage page.



1. Click on **Form Configuration** under the **Lead Settings**
2. **To Add/ Delete field** :
   Click on the attribute under **Lead Attribute** listing which will get added under **Selected Fields** and **Save Configuration**
   Click on cross red icon under **Selected field** listing and **Save Configuration**
3. **Mandatory/Non Mandatory field** :
   Click on green edit icon and tick on Mandatory box and click on green tick again [**Okay**] and then **Save Configuration**
   Edit the field , remove tick -> Okay -> Save Configuration
4. **Editable/Non Editable**:
   Click on green edit icon, give the Display Name and click on green tick again [**Okay**] and then **Save Configuration**

5. **Rename Field Name** :
   Click on green edit icon and tick on Editable box and click on green tick again [**Okay**] and then **Save Configuration**
   Edit the field , remove tick -> Okay -> Save Configuration
6. Reorder/Rearrange Field **: Drag and Drop** the field under **Selected Fields** and **Save Configuration**

• How to Configure Lead Score Rules?

Description: This helps to determine if a lead is worth passing from User marketing team on to sales. It automatically score inbound leads with a numerical value to indicate how interested they are in User product or service.
System automatically give points to a lead based on a number of different factors/ rules configured in the system , such as the industry the lead works in or their level of interest in User product. Qualities that are associated with past high-value leads have more points.

To configure **Lead Score rules**,

1. Go to **Settings** -> **Lead Settings** -> **Lead Score**
2. Click on **Add Score Rule**
3. Add conditions as needed
4. Apply Score of either **Addition** or **Subtraction**
5. Click on **Add**.

Note : User can check "**How it works?"** on right side. Lead Score is mainly to prioritize User leads based on colour and points. This points gets allocated when the lead satisfy the conditions /rules defined.

In My Leads page, User can view the leads listing with point and colour.

• How to Add Lead Source?

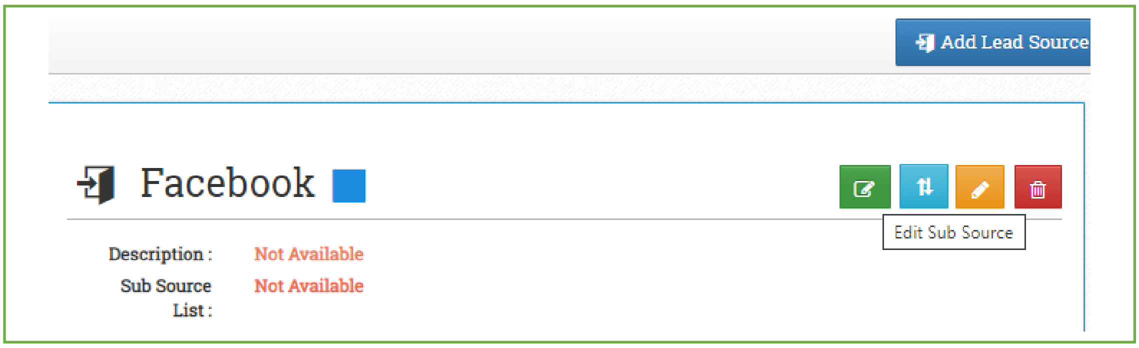
Description : User can define the list of sources from where User get the leads ; FB, Indiamart, JD, LinkedIn etc .Leads can be segregated based on the sources they are received.

To Add **Lead Source**,

1. Click on **Lead Source** under **Lead Settings**
2. Click on **Add Lead Source**
3. Enter the **Source Name** and Description
4. User can also choose the colour by clicking on the Colour shown
5. Click on **Add**.

- ## How to Add Lead Sub Source List?

Description: User can define the sub-sources under every main lead source to have more clarity on the sources User get more leads.



To **Add Lead Sub Source**,

1. Click on the **Lead Source** under **Lead Settings**
2. Choose the **Source** User want to add list
3. Click on the first icon called **Edit Sub Source**
4. Enter the list of name and click **Enter**
5. User can **order the list Values** by clicking on second icon.

- ## How to Add Lead Status and Define Sequence?

Description: User can define the Lead workflow under Lead Status with a proper sequence. While every lead status change , system will show the next work item to the User. [Ex: New -> Contacted > Site Visited -> Quote Sent etc]

To Add the **Lead Status** with **Sequence**,

1. Click on **Lead Status** under **Lead Settings**

2. Click on **Add Lead Status**
3. Enter the status name and choose the number of **sequence**
4. Choose the colour to the status [optional]
5. Click on **Add**.

Note: Once the status is created by clicking on edit icon also the sequence can be changed.

• How to configure Lead Status Rule?

Description: User can set a rule for all Executives in the system that they should not able to change from one status to another status [Ex: Contacted to New], User can define the conditions/rules by below steps.

To configure **Lead Status Rule**,

1. Click on **Lead Status rule** under the **Lead Settings**
2. Choose the **User Type** User want apply rule
3. Click edit option on right side corner of box
4. Choose the Primary Rule **Allowed/Not allowed**
5. Apply the conditions/Rules User want to define.
6. Click on **update**.

Note : What are Lead Status Rule?

This will make the Users under that User Type ; to change status from only Allowed conditions which User have set or will not allow for the Not Allowed conditions.

• How to Add Lead Status Dependency List?

Description: User can add the mandatory checkpoints when Lead status change happens.

To Add **Lead Status Dependency List**

1. Click on the **Lead Status Dependency** under the **Lead Settings**
2. Select the Status User want to add the check list
3. Click on the **"+"** icon beside the **Dependency Field Listing**
4. Add the fields User want

   Note : Adding dependency fields to Status values, while any user trying to change the status of any lead, will ask for this fields to fill up as mandatory and then only he can move to this status.

• How to Delete the Lead Individually?

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

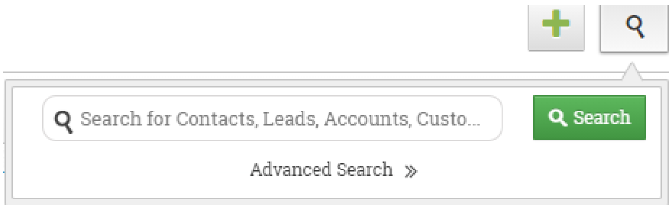
To **Delete** Lead,

1. Open the **Lead** 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 Lead can be deleted.

• How to Bulk Delete the Leads ?

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

To **Bulk Delete** Leads,



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 " Lead" and then give the conditions(such as Lead 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 Lead**

Note : All the **Open Reminders** must be closed then only the Lead can be deleted.
If there more than 2000 Leads that need to be deleted, User send the Support Request to Maple Support Team to bulk delete the leads with lead conditions.

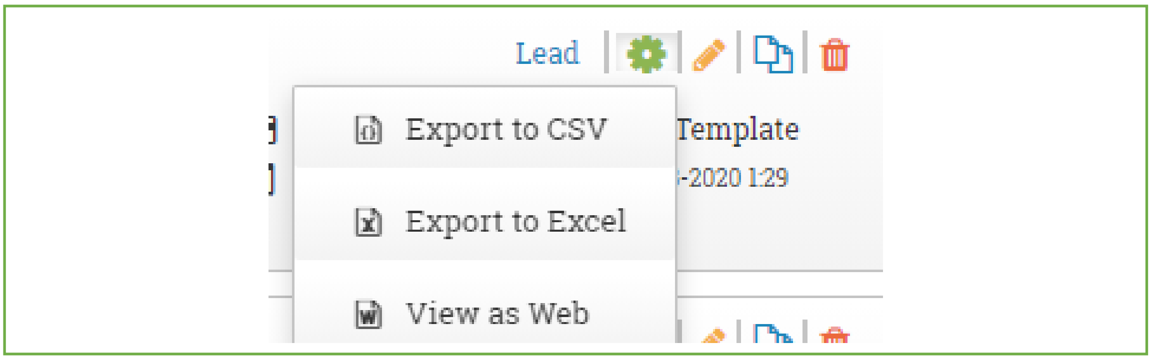
- ## How to Bulk Reassign Leads ?

Description : User can transfer the Leads in bulk from one user to another user using below steps.

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 " Lead" and then give the conditions(such as Lead 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 Lead**
5. Select the **New Owner**
6. **'Action on existing Reminders'** to **'Move to New Lead Owner'** or **Add a reminder to New Lead Owner** and **Save**

- **How to run a Lead Report/ Export lead data from CRM ?**

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



1. Go to **Reports -> Custom Reports**
2. Click on **New Report** and choose the context " **Lead**"
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 configure custom tables in Leads?**

Description : These tables can be used if there is any repeated data has to be updated to each Lead. There can be multiple tables configured. These tables can be configured by Maple Support Team.

To configure the custom table,

1. Go to **Settings** -> **Lead Settings -> Custom Table**
2. Enter **Table Name**, **Table Title** and **Permissions**
3. Then add custom attributes with data type
4. DB names must be without spaces [Ex: AdmissionDate]