Account Configuration User Guide

Description: These are fresh enquires who has shown interest in user product/service**.** This context is used mainly for B2B - Products and Service clients**.**

Admin can configure/do changes in the following; adding/deleting new account field, users, rearranging, add new account source, account workflow under Account Status, Account Category etc.

Account Settings:

• How to Add Account Custom Attributes?

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

To Add **Account Custom Attribute,**

1. Go to **Settings** -> **Account Settings**-> **Custom Attribute**
2. Click on **Add Custom Attribute** on top right
3. Give the **Attribute Name**, select the **Data Type**

4. Click on **Add**

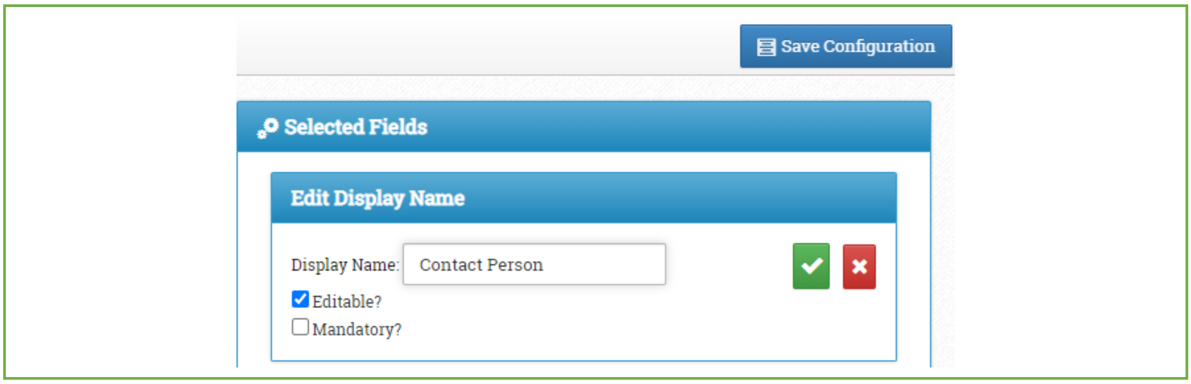
- ## How to add Product Catalogue list in Add Account Form?

Description: All the products uploaded under Product Catalogue can be added in Add Account Form which will help user to choose the products interested by the enquiry.

1. Go to **Settings** -> **Account Settings**-> **Custom Attribute**
2. Click on **Add Custom Attribute** on top right
3. Give the **Attribute Name**, select the **Data Type "Products"**
4. Click on **Add**

- ## How to set General Account Form Configuration?

Description: Maple lets Admin User to customize the Add Account form page as required. User can customize the field names , order in which the field has to appear in Account Form. The same shall be reflected in the Account Manage page.
Below settings can be followed when User have same set of fields for all Account Categories.



1. There are 2 Account form configuration ; General and Category based Form Configuration.
2. Go to **Settings** -> **Account Settings**
3. General **Form Configuration** option is under Account Settings
4. In General FC, User can Rename the field Display names, change the order of the fields by Drag and Drop.

- **To Add/ Delete field** :
  Click on the attribute under **Account Attribute** listing which will get added under **Selected Fields** and **Save Configuration**
  Click on cross red icon under **Selected field** listing to remove and **Save Configuration**
- **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
- **Editable/Non Editable** :
  Click on green edit icon, give the Display Name and click on green tick again [**Okay**] and then **Save Configuration**
- **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
- Reorder/Rearrange Field **: Drag and Drop** the field under **Selected Fields** and **Save Configuration**

• How to set Form Configuration to every Account Category?

Description: This Settings followed when User have different set of fields for every Category User choose, while Add Account.

1. Go to **Settings** -> **Account Settings -> Account Category**

2. Click on any one **Category** and first green icon on right side options **Account Form Configuration**
3. User can make the following changes to each Category,
   - **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
   - **Editable/Non Editable**:
     Click on green edit icon, give the Display Name and click on green tick again [**Okay**] and then **Save Configuration**
   - **To Add/ Delete field** :
     Click on the attribute under **Account Attribute** listing which will get added under **Selected Fields** and **Save Configuration**
     Click on cross red icon under **Selected field** listing to remove and **Save Configuration**

• How to add a new Account Category?

Description : Category can be defined based on type of enquiries User deal with. [Ex: MSME, Dealer, Trader etc] .
Account Category drives the entire show in Accounts. User can have Category based custom field listing, different workflow for each Category, Category based User listing.

1. Go to **Settings** -> **Account Settings -> Account Category**
2. Click on **Add Account Category**
3. Enter the Name and description and choose the colour, Click on **Add**
4. Once category created click on first icon called **Account Form configuration**
5. User can set fields which are only applicable to this Category under **Account Form Configuration** [first green icon]
6. User can set the workflow/Account Status applicable only a particular Category on the right side of the page.

Note : To Set different account status flow to different Category,

- Click on the Account Category, choose the Category
- Click on wrong button if User want to remove status from list

- Click on”+” Icon if User want to add the Status to list.

How to add a new Account Status?

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

1. Click on the **Account Status** under **Account Settings**
2. Click on **Add Account Status** on top Right
3. Enter the name and select the sequence
4. Choose the colour by clicking on the colour shown
5. Select that check box if User want that status to be **archived/deleted** in particular status
6. Click on **Add**.

Note: By clicking on edit icon User can edit the sequence, colour, uncheck the box for status deletion/Archive in this status.

How to add a new Account State?

Description: Account State shows the present state of the enquiry; like whether it is immediate requirement or not, no response or the requirement is closed. [Ex: Hot, Warm, Cold, Dead]

1. Click on **Add State** under **Account Settings**
2. Click on **Add State** on top right
3. Enter the name and Select the **priority**
4. Select the colour by clicking on the colour shown under priority
5. Click on **Add**.

Note:

- By clicking on the edit icon beside of state name.
- User can also Change the priority and colour.

How to Add Account Source?

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

1. Click on **Account Source** under **Account Settings**
2. Click on **Add Account Source**
3. Enter the name and description & change the colour
4. Click on **Add**.

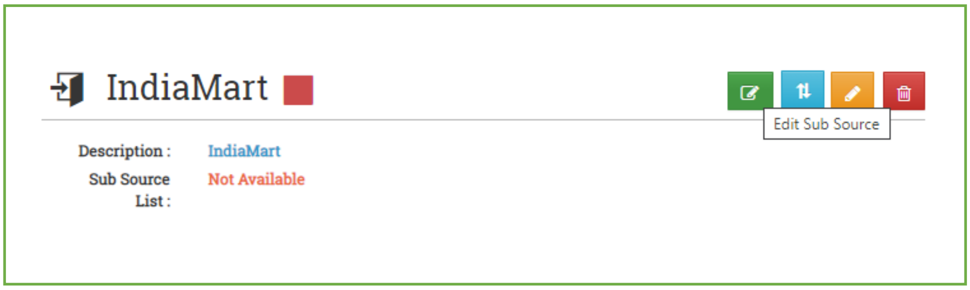
Note:

- By Clicking on the edit icon beside of Source name
- User change the description, colour of source.

How to Add the Account Sub Source List?

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

To Add the Account **Sub Source List**,



1. Click on the **Account Source** under **Account 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 second icon.

- ## How to Assign Category to Users/ Category - User mapping ?

Description: Admin User r can assign a set of Users who can work for only a particular Category by Category -User mapping.

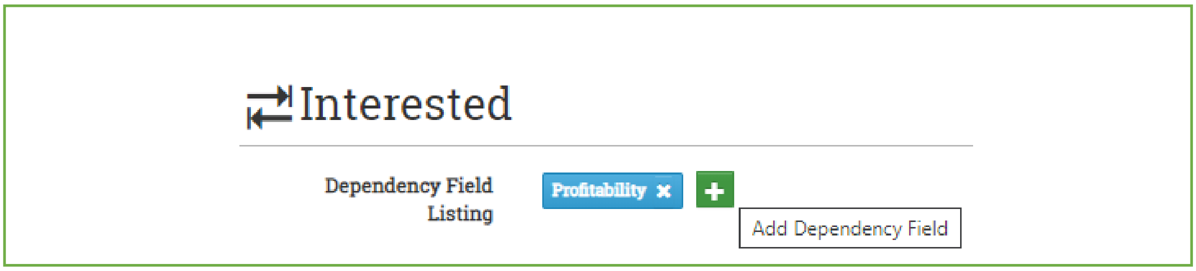
To assign the category to different user, follow the below steps,

1. Click on **Category Mapping** under **Account Settings**
2. Click on the User to map the category
3. If User want to remove the Category click on **wrong mark** next to the **category name**
4. If User want to add the Category, click on the drop down of **Add Category** on right side
5. Choose the category User want to **Add**

- ## How to Define Status dependency List?

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

To define the **Status dependency List**,



1. Click on **Status Dependency**, under the **Account Settings**
2. Choose the status User want to define the list of fields
3. Click on **"+"** icon next to the **Dependency Field Listing**
4. Choose the field which User want to be shown in **Change of Status**

How to Delete the 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** account,

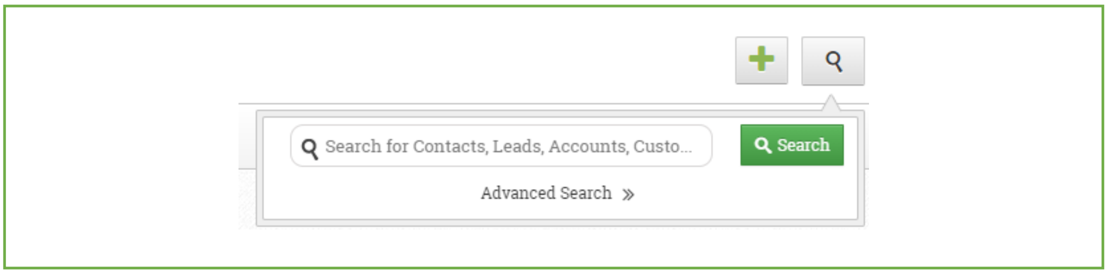
1. Open the **Account** User wish to **Delete**
2. Under **Actions**, click on **Delete**
3. Delete option shall be visible only if User have the permission to **Delete**

Note : If there are **Open Reminders** present under the Account or the status does **not allow archiving/deleting** then the system shall show a message stating that it is **unable to Archive/Delete** the account.

How to Bulk Delete the Accounts ?

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

To **Bulk Delete** Accounts,



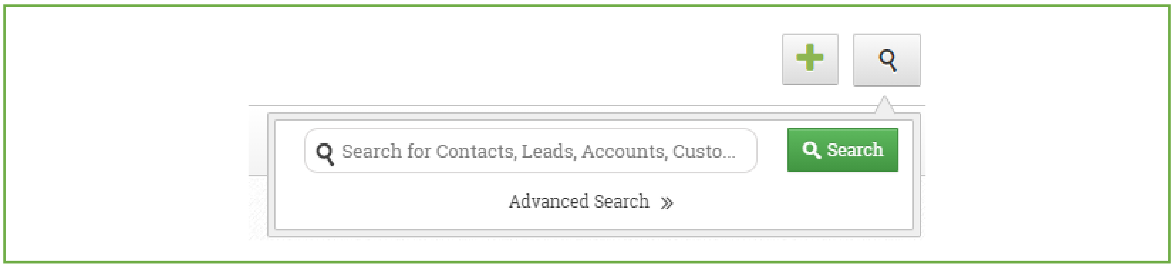
1. Click on **Search** button (Near to '+' symbol in top right of the page) and go to ‘**Advanced Search’**
2. In Search in, select the context " Account" and then give the conditions(such as Account Owner is XXX) and click on ‘Search’.
3. Give the 'records per page' User want. ie, 10/25/50/100 and click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

Note : If there are **Open Reminders** present under the Account or the status does **not allow archiving/deleting** then the system shall show a message stating that it is **unable to Archive/Delete** the account.

If there more than 2000 Accounts that need to be deleted, User send the Support Request to Maple Support Team to bulk delete the Account with conditions.

- ## How to Bulk Reassign Accounts ?

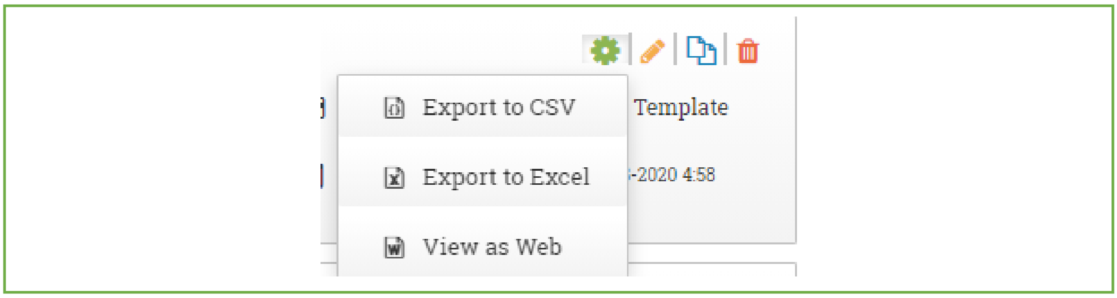
Description : User can transfer the Accounts in bulk from one user to another user using below steps.



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 " 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**
6. **'Action on existing Reminders'** to **'Move to New Account Owner'** or **Add a reminder to New Account Owner** and **Save**

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

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



1. Go to **Reports -> Custom Reports**
2. Click on **New Report** and choose the context " **Accounts**"
3. Give the **Time Period** filter [Ex: Expected Conversion This Month] and additional filter condition [Ex: Account 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 Accounts?

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

To configure the custom table,

1. Go to **Settings** -> **Account 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: QuotationDate]