Customer & Deal Configuration User Guide

Description: Customer are the converted Accounts/enquiries where there is scope of either repeated orders or post services or both.

Admin can configure/do changes in the following; Adding/Deleting new account field, rearranging, add new account source, Customer workflow under Customer Status, Customer Category etc.

Customer Settings:

Deal Settings:

Customer Configuration

- **How to Add Customer Custom Attributes?**

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

To Add **Customer Custom Attribute,**

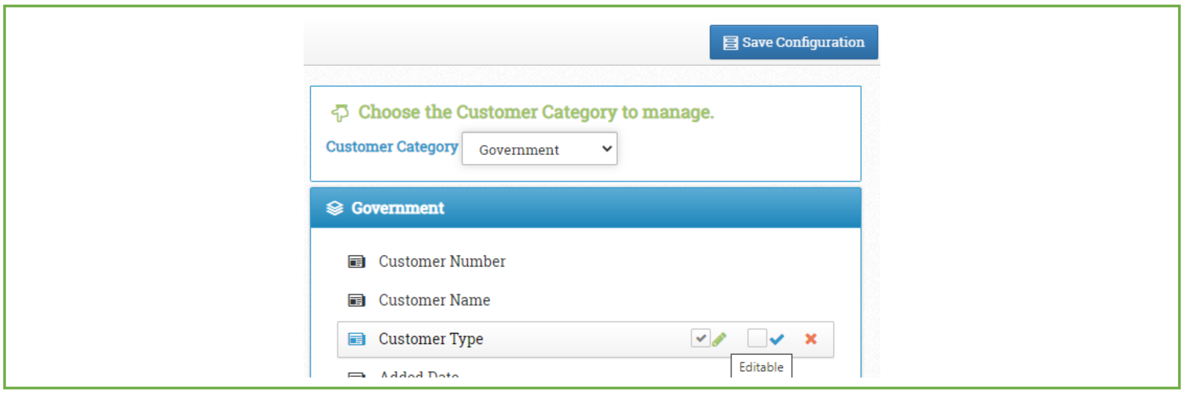
1. Go to **Settings** ->**Customer Settings**->**Custom Attribute**
2. Click on **Add Custom Attributes**
3. Give the **Attribute Name**, select the **Data Type**
4. Click on **Add**

Note: User can set dependency for this attribute.

1. Click on Attribute to set Dependency
2. Click on 2nd icon called update Dependency
3. Choose the data context when this field need to be shown.
4. Select the field Click on save.

• How to set Customer Form Configuration?

Description: Maple lets Admin User to configure the Add Customer form page as required. User can customize the field names and also the order in which the field names have to appear. The same shall be reflected in the Customer Manage page.
User can do all the below settings in the form configuration,



1. Click on **Form Configuration** under **Customer Settings**

2. When User have different set of fields for every Customer Category User choose in Add Customer form, then choose the Category and its related fields and **Save Configuration.**
   Only one Category at a time and **Save Configuration** always when User do any changes.
3. User can also make field **Mandatory/ Non-Mandatory**, **Editable**/**Non Editable** for each **Category**
4. **Rename** the default fields , change the order of fields in Add Customer form by drag and drop of fields [left side attributes listing]

- ## How to add a new Customer Category?

Description: Category can be defined based on type of enquiries User deal with. [Ex: MSME, Dealer, Trader etc]

To **Add Category**, please follow below steps,

1. Go to **Settings** -> **Customer Settings** -> **Customer Category**
2. Click on **Add Customer Category** on top right
3. Enter the category name along with description
4. Enter the Name and description and choose the colour, Click on **Add**

Note: By clicking on the edit option next to category name User can able to change the description and colour.

- ## How to add a new Customer Status?

Description: Admin User can define the customer workflow under Customer Status with a proper sequence. While every Customer status change , system will show the next work item to the User. [Ex: New -> Contacted > Reorder -> Closed etc]

1. Click on the **Customer Status** under **Customer Settings**
2. Click on the **Add Customer Status** on top right
3. Enter the name and select the sequence
4. Choose the colour by clicking on colour shown under sequence number

5. Click on **Add**.

Note: By clicking on edit icon User can edit the sequence and colour.

- ## How to do Account to Customer Conversion field mapping?

Description: When an enquiry is Won and there will be a scope of repeated orders. Then the same Account will get converted into Customer.

This field mapping will help User to have a default Account- Customer field mapping so within 1 or 2 clicks, the conversion can be done. All the Account data values gets transferred to Customer data field based on this mapping.

To do the **conversion mapping**, follow the below steps,

1. Click on the **Conversion Map** under **Customer Settings**.
2. Map the fields of **Account with Customer** fields.
3. Click on **Save Field Map Configuration**.

- ## How to Delete the Customer Individually?

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

To **Delete** Customer,

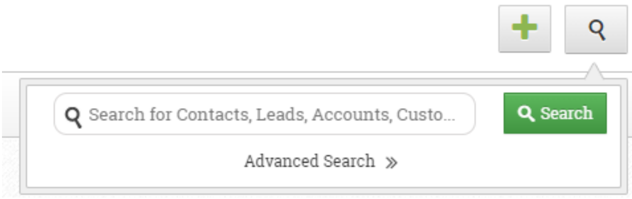
1. Open the **Customer** User wish to **Delete**
2. Under **Actions**, click on **Delete**
3. Delete option shall be visible only if User have the permission to **Delete**

Note : If there are **Open Reminders** present under the Customer then the system shall show a message stating that it is **unable to Delete** the Customer. If there more than 2000 Customers that need to be deleted, User send the Support Request to Maple Support Team to bulk delete the Customer with conditions.

How to Bulk Delete the Customers?

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

To **Bulk Delete** Customers,



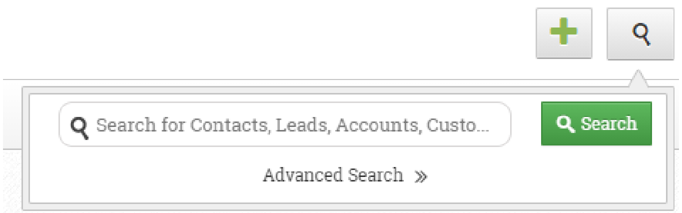
1. Click on **Search** button (Near to '+' symbol in top right of the page) and go to ‘**Advanced Search’**
2. In Search in, select the context " Customer" and then give the conditions(such as Customer Owner is XXX) and click on ‘Search’.
3. Give the 'records per page' User want. ie, 10/25/50/100 and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

Note : If there are **Open Reminders** present under the Customer then the system shall show a message stating that it is **unable to Delete** the Customer.

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

How to Bulk Reassign Customers ?

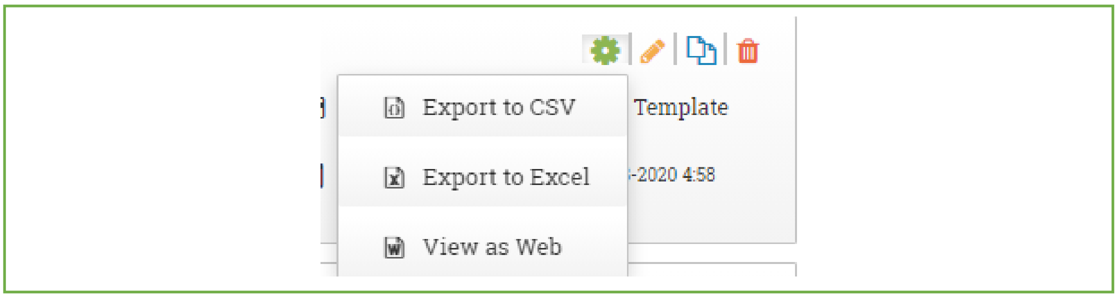
Description : User can transfer the Customers in bulk from one user to another user using below steps.



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

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

To **export** Customer data from **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 New]
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 Customers?

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

  To configure the custom table,

  1. Go to **Settings** -> **Customer 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]

Deal Configuration

Description: Deals are for adding repeated orders/sales from the existing Customers. There can be multiple Deals under single Customer and each Deal will have its own Sales workflow, updates, reports.

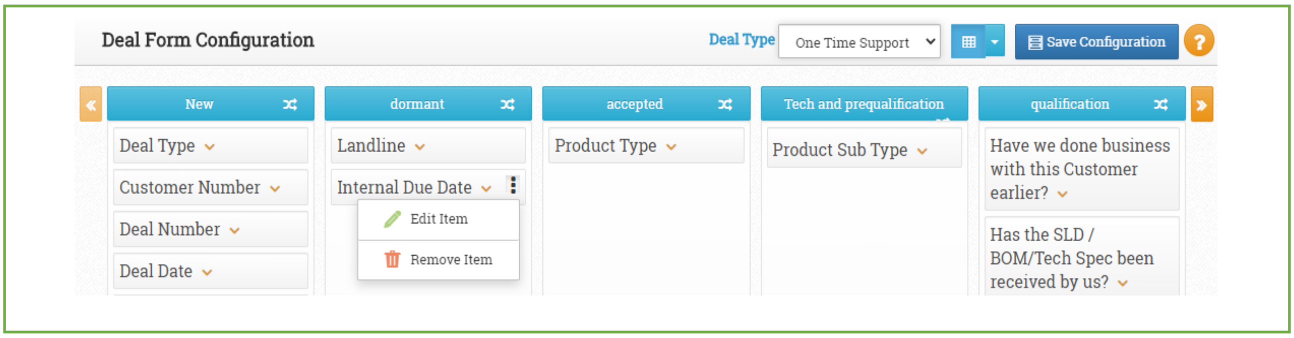
- ## How to Add Deal Custom Attribute?

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

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

- ## How to set Deal Form Configuration?

  Description: Maple lets Admin User to configure the Add Deal form page as required. User can customize the field names and also the order in which the field names have to appear. The same shall be reflected in the Deal Manage page.



1. Click on **Deal Form Configuration** under the **Deal Settings**.
2. All the below configurations can be done in Deal Form Configuration;
   - For each Deal Type, User can set different set of fields
   - Renaming of the field
   - Mandatory/Non Mandatory
   - Editable/Non- Editable
   - User can remove the field from Deal Form, click in **Remove Item.**

   [Above changes can be set by clicking on the three dots next to each field name, User can make and click on **tick mark** to update and **Save Configuration**]
   - Reordering of the fields
   - Setting Pre-checks and Post-checks for every Deal Status

   [Above changes can be set by clicking navigate icon next to every status]
3. Click on **Save Configuration** on top right on any changes in the form.

Note : Click on '**?'** symbol on next to Save Configuration to get steps and more details about this configuration.

- ## How to add a new Deal Status?

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

To **Add Deal Status**, Follow the below steps,

1. Click on **Deal Status** under the **deal settings**
2. Enter the **Deal Status Name**, along with Sequence
3. Choose colour shown under the sequence
4. Click on **Add**.

Note: By clicking on edit icon User can edit the sequence, colour.

- ## How to add a new Deal Type?

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

  1. Go to **Settings** -> **Deal Settings -> Deal Type**
  2. Click on **Add Deal Type**
  3. Enter the Name and description and choose the colour, Click on **Add**
  4. User can set the workflow/deal status applicable only a particular Type on the right side of the page.

  Note : To Set different deal status flow to different Type,

  - Click on the Deal Type, choose the Type
  - 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 do Deal Type – User mapping?

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

  To configure **Deal Users**,

  1. Click on the **Deal Users** under **Deal settings**.
  2. Click on the **Deal Type**
  3. Click on "**+**" icon in right side box for User/User Group/User Type
  4. If User Group/ User Type are chosen, all users who come under that group/type will have this deal type access.

- ## How to Delete the Deal Individually?

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

  To **Delete** Deal,

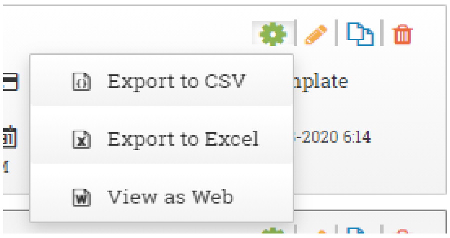
  1. Open the Deal user wish to **Delete**

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

Note : If there are **Open Reminders** present under the Deal then the system shall show a message stating that it is **unable to Delete** the Deal.
If there more than 2000 Deal that need to be deleted, User send the Support Request to Maple Support Team to bulk delete the Customer with conditions.

• How to run a Deal 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 “**Deal**”
3. Give the **Time Period** filter [Ex: Expected Conversion This Month] and additional filter condition [Ex: 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 do Account to Deal Conversion field mapping?

Description: This happens when an enquiry/account is directly getting converted into an Order along with Customer creation.

When an enquiry is converted and need to moved to dispatch, Account can be directly converted into Deal , meantime Customer is also created here. This field mapping will help User to have a default Account -

Customer field mapping , Deal- Account mapping so within 3 to 4 clicks, the conversion can be done. All the Account data values gets transferred to Customer field as well as to Deal field based on this mapping.

To do the **conversion mapping**, follow the below steps,

1. Click on the **Conversion Map** under **Deal Settings**.
2. Map the fields of **Account -Customer and Account- Deal** fields.
3. Click on **Save Field Map Configuration**.