

maple crm



CRM for small business

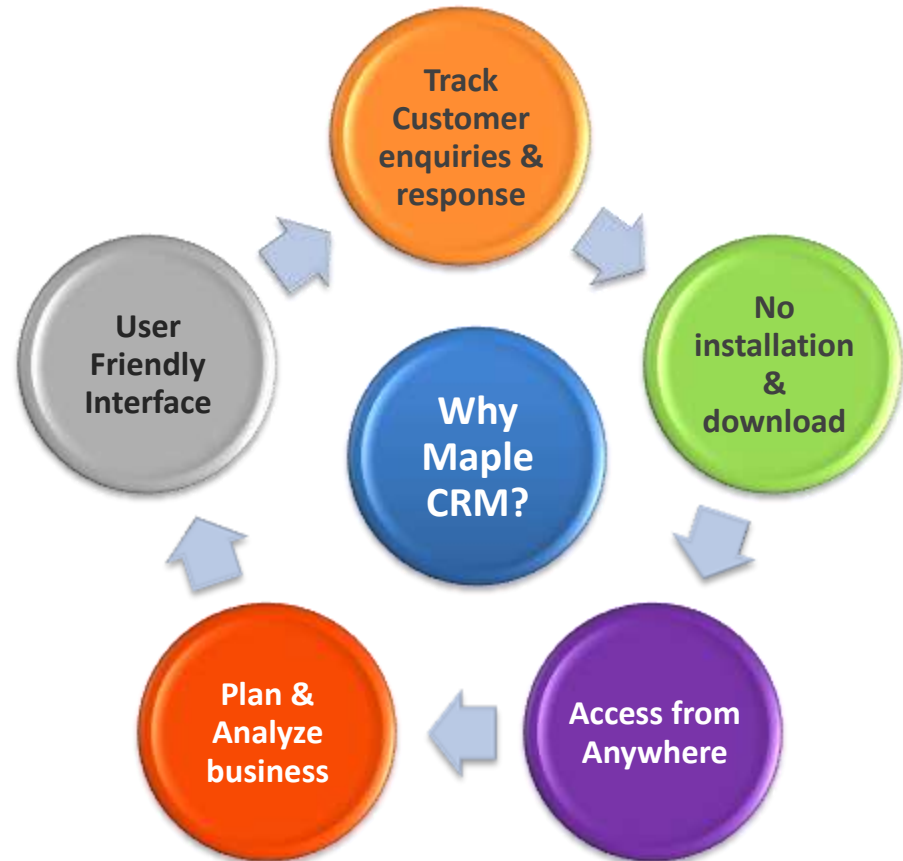
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CRM for Small Business

Customer Relationship Management (CRM) Software refers to a technological solution that help businesses manage customer relationships in an organized way. CRM softwares are considered as a tool that improves productivity and overall business functionality.

Maple CRM is a simple hosted CRM software that helps to automate your business activities. With Maple CRM, you can improve work efficiency and bring in an ideal workflow environment within your organization.

Maple is cost effective, user friendly and lightweight CRM for any small/medium organization to accommodate in their business process model.



Web Based CRM to increase work productivity

Maple CRM is an on-demand CRM which can be accessed via the browser as a web service.

Web based CRM allows you to perform sales management customer service management, post sales support and to administrate your marketing campaigns.

Maple CRM has been targeting Small Business Companies for complete business automating solution. Being a web based CRM software, the product helps in streamlining you day to day business activities with its various features serving all types of industries and focusing on sales, marketing and customer service automation.

Technology

Communication

People

Information

Process

Core Functions

MODES OF OPERATION/LICENSING

CRM FOR SALES & MARKETING

- Email & SMS Marketing
- Marketing to Lead to Account Sales Pipeline
- Marketing campaigns automation.
- CAN-SPAM complaint SPAM free bulk email
- Bulk SMS (India mobile numbers only)
- Design HTML email templates
- Grouping & Tagging
- Do-Not-Disturb & Unsubscribe Options

SUPPORT DESK MANAGEMENT

- Ticket creation using web service API
- Ticket creation from ZipDial toll free
- Auto assignment – location, past records
- Automatic load balancing – round robin
- Automatic load balancing – custom defined

CRM FOR CUSTOMER MANAGEMENT

- Account creation from website/email/zipdial
- Auto assignment based on type and nature
- Activities & Schedules to manage work
- Send email and SMS to customers
- Schedule SMS – Alerts to customer
- Custom reports, export to MS-Excel
- Analytics – Charts & Graphs

COMPLETE CRM

- Sales & Marketing Tools
- Lead Generation
- Sales & Execution management
- Customer management functions
- Custom Reports, Charts, Email, SMS
- Customer sales and support
- Post sales feedback and RCA

Access control & Privileges

USER ACCESS CONTROL

- Support for multi office, multi division management.
- Support for user groups with separate access control
- No access to each other for work items belongs to two different groups.
- Superior admin control with birds eye view to all users and work items.

FOR ALL USERS

- Dashboard with current day activities and pending activities.
- Graph to explain the overall work versus each persons work with sub classification.
- Access to daily, weekly and monthly calendar.
- Configuring personal tasks and news preference.
- Notifications & Announcements.
- Internal message board.

FOR GROUP USERS

- All features of normal user.
- Access to group calendar
- Access to all work items and activities of group users.
- Manage users and permissions within the group.
- Analyse work at a group level.
- Group announcements.

FOR ADMIN USERS

- All features of normal and group user.
- Access to organization level calendar
- Access to all work items and activities of all users
- Manage users and permissions across organization.
- Administrative level control for backup, global configuration.
- Individual, Group and Organization level announcements.

The Interface

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Welcome : user_delhi Personal Tasks Edit My Details Logout

Sample Organization

Dashboard Contacts Leads Accounts Activities Schedules Add-Ons Reports Help Logout

Quick Search

Calendar

User : enduser_delhi

December 2011

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Today

Current News

Schedules Today Pending Tasks Account Charts Personal Tasks Administration

My Accounts Status

- Open (2)
- Converted (4)
- Followup (8)
- Idle (6)
- New (54)
- Open (4)
- Scheduled (18)

Overall Accounts Status (%)

- Closed (7.82%)
- Converted (20.77%)
- Followup (1.54%)
- Idle (12.95%)
- New (44.62%)
- Open (7.82%)
- Rejected (1.54%)
- Scheduled (2.95%)

The design experts of Maple CRM has taken at most care in making sure that the user interface is friendly and understandable to any user of a small organization.

Single page Account administration and multi tabbed dashboard interfaces are the result of user interface simplification.

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Welcome : user_delhi Personal Tasks Edit My Details Logout

Sample Organization

Dashboard Contacts Leads Accounts Activities Schedules Add-Ons Reports Help Logout

FAQ: How to use this page?

General Data Description Custom data Remarks Activities Tags Documents

Edit Account

Account No	AC02475	Account Date	06-12-2011
Customer Name	Venkatesh & Associates		
Location	Uttar Pradesh	Phone	9897374235
Email	venkatesha@dummysmail.com		
Account Category	Prime	Organization	Sample Organization
Account Type	Friend	Assigned User	user_delhi
Account Status	New	Account State	Hot
Scheduled	Yes	Last_modified	08-12-2011 20:12:28

Send Mail

Send SMS

Status ▼

Reporting - Define your own reports

Maple CRM provides the flexibility to configure reports based on the type and need of your business. Maple's powerful custom reports feature enabled to take reports from any angle of your business or process model.

The screenshot displays the Maple CRM reporting configuration interface. At the top, the user is logged in as 'user_delhi' with options for 'Personal Tasks', 'Edit My Details', and 'Logout'. The navigation menu includes 'Dashboard', 'Contacts', 'Leads', 'Accounts', 'Activities', 'Schedules', 'Add-Ons', 'Reports', 'Help', and 'Logout'. The 'Sample Organization' is identified.

The 'Report Type' section offers two options: 'View as Report' (unselected) and 'Export to CSV File' (selected).

Three tabs are available: 'Account Based' (selected), 'Activity Based', and 'Schedule Based'.

The 'Report Fields' section consists of two columns: 'Fields' and 'Selected Fields'. The 'Fields' column lists various attributes such as 'Account Number', 'Account Phone', 'Account State', 'Account Status', 'Account Tag Name', 'Account Type', 'Assigned User', 'Custom Amount', 'Custom Application Nur', and 'Custom Country'. The 'Selected Fields' column lists 'Account Category', 'Account Date', 'Account Description', 'Account Email', 'Account Location', and 'Account Name'. Arrows indicate the movement of fields between these columns.

The 'Report Filter' section contains three filter conditions:

- Fields: Account Tag Name, Operator: Equals, Value: BADCREDITHISTORY
- Operator: AND
- Fields: Account Location, Operator: Equals, Value: Bangalore
- Operator: AND
- Fields: Custom Amount, Operator: Less Than, Value: 10000

Each filter condition includes a red 'X' icon for removal. An 'Add More Conditions' button is located at the bottom right of the filter section.

A 'Generate Report' button with a green checkmark icon is positioned at the bottom center of the interface.

Customer Management - The Flow

Source of enquiry / service request

Your website



Zipdial



Customer mails to:

info@yourcompany.com

Add account in Maple



Integrate other systems using

Web Service API

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Actions:

Auto assignment

- Based on source of enquiries
- Based on type of enquiries
- Based on customer identification (source phone or email)

Process:

- Track activities and schedules
- Send mail to customer
- Send SMS to customer
- Check daily work sheet
- Check and close pending tasks
- Collaborate within the team with multiple activities for each customer.
- Generate Reports & Graphs to understand the status of work.
- Understand the account lifecycle using Process Flow.

Maple Advantage

Process Advantage:

Streamline process such that

- Single place administration.
- Better control over work burn down
- Prompt response to customer resulting in better customer satisfaction
- Business progress (monthly/weekly) analysis

Cost Advantage:

- No costly hardware required
- No worries of installation/setup
- No worries of crashes /virus attack
- No worries of backup & recovery
- Access anywhere from web

Business Advantage:

- * Maintain elegant communication model to your customers (using email and SMS templates)
- * Apply RCA (Root Cause Analysis), What went wrong, good & bad based on reports and charts.

Maple Email Power - Scheduled response

In a service type business, 'on-time' reminders and notifications are very important to retain your customer. Maple can be configured to send scheduled email or SMS responses.

Process Flow



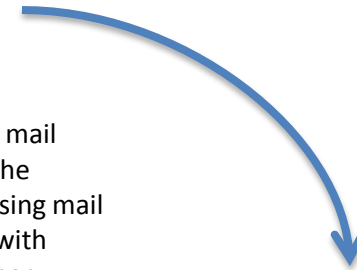
Customer signs in for a service with 3 months validity period



Data goes into Maple CRM, with an additional settings to send email automatically 5 days before expiry.



Maple CRM sends mail automatically on the predefined date using mail template filled in with configured customer attribute values.



One time configuration of mail merge template

Dear <Customer Name>,
Thank you for choosing the service from us. Your service <service name> is expiring on <expiry date>. Please renew the same.
Thanks & Regards,
Your Company

Customer data in Maple CRM

General Data	Description	Custom data	Remarks	Activities	Tags	Documents
Account No	ACC0475	Account Date	04-12-2011			
Customer Name	venkatesh & Associates					
Location	Uttar Pradesh	Phone	9897314235			
Email	venkatesh@dummyemail.com					
Account Category	Prime	Organization	Sample Organization			
Account Type	Fixed	Assigned User	user_001			
Account Status	New	Account State	Not			
Scheduled	Yes	Last Modified	04-12-2011 20:12:28			

customer data gets filled in the mail from CRM records

Sales Force Automation



- Manage Contacts, Leads and Accounts
- Integration of web page for lead generation
- Forecasting and Analysis with Reports
- Product Catalogue for organization reference
- Charts for accounts analysis
- Scheduler and Calendar for time management
- Exporting of reports for future reference



Marketing Automation

- Mass email campaign with HTML and Plain Text options
- Classification and tagging for handling contacts and customers
- Customizable reports for managing marketing techniques
- SMS campaigns with template configuration support

→ Design, Deliver, Track campaigns & customer behavior. Reduce the repetitive tasks using Maple CRM marketing software.

→ Maple's Tagging feature allows to classify, nurture, observe and filter the pattern and behavior of customer reactions to campaigns and marketing.

Contacts



Campaigns

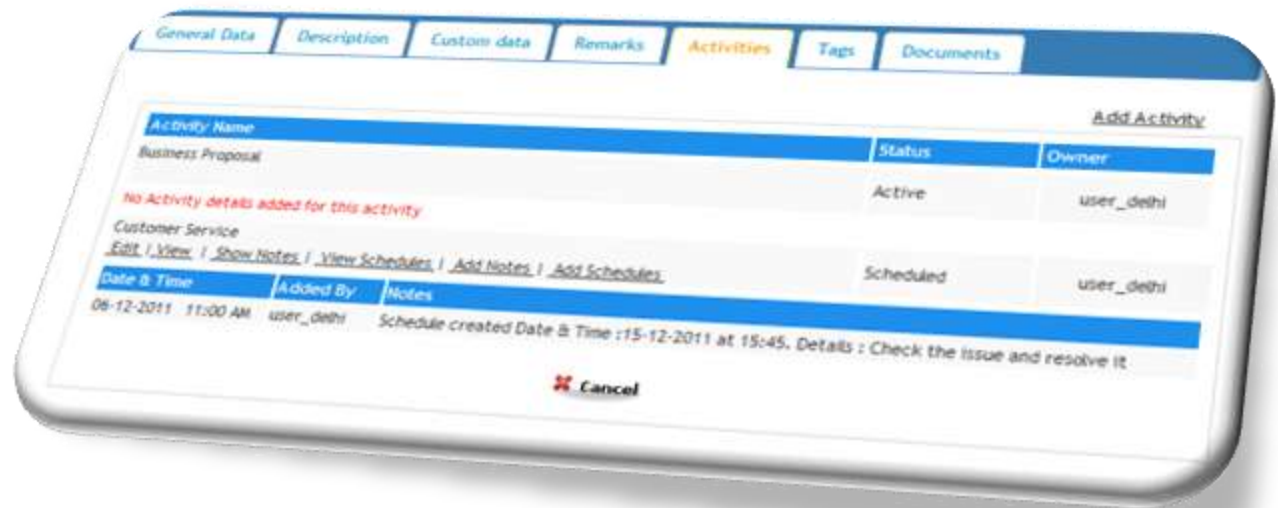


Leads



Customers

Help Desk



- ▶ *Customer Satisfaction*
- ▶ *Efficient work management*
- ▶ *Easy sharing of information*
- ▶ *Accurate data*
- ▶ *Saves time*
- ▶ *Automated processes*
- ▶ *Easy accessibility*

- Manage support ticket and requests
- Track complete history of the support and customer
- Manage activities and schedules
- Custom attributes and activity notes

Security Management | Product Customization

Users & User groups

Create groups and user access model specific to your organization structure

Login History

Activity history visibility of each user for better auditing and system security

Permission Settings

Control the access to the software according to users

Monitor employees

Monitor the accounts, activities and schedules of your employees from your desk

Custom Attributes

Add custom attributes to define your service or process as per your business requirements

Classify Accounts

Define Account classification according to your business process and service life cycle.

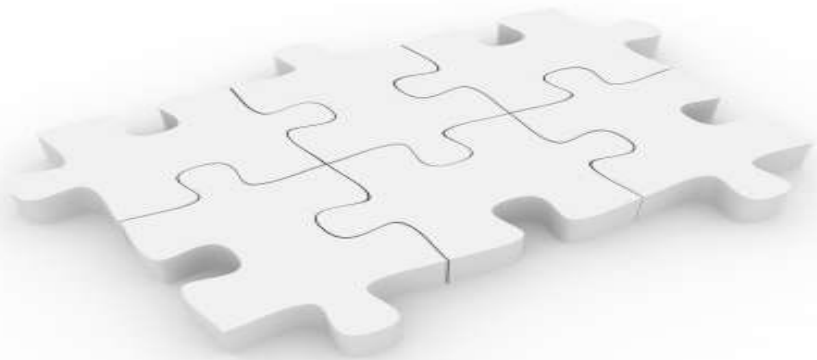
Tagging

Create tag names relevant to your work and attach/detach at any point of the work item life cycle.

Templates

Create email and SMS templates for easy usage and maintain the organization level communication standards

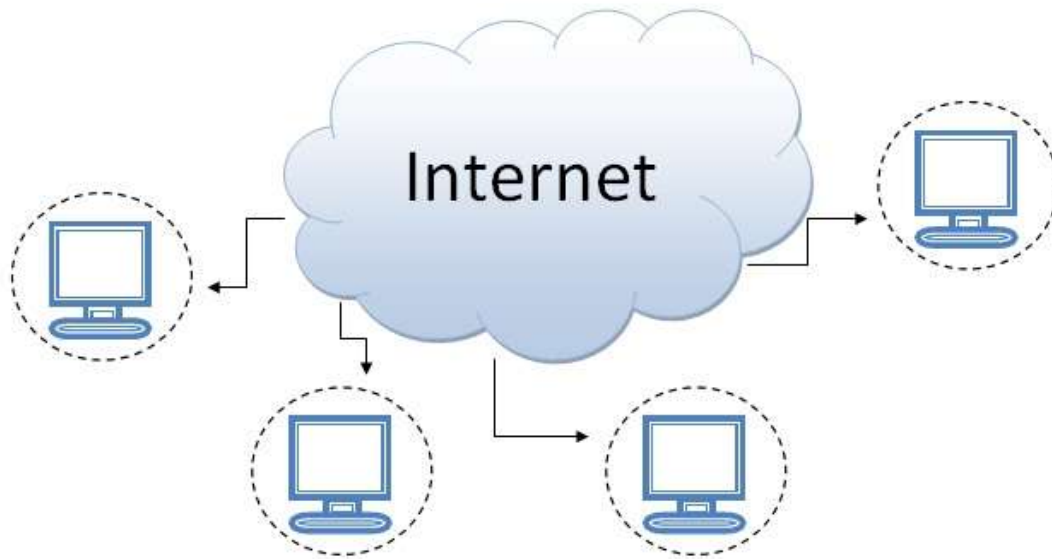
Integration to Maple



- Webpage integration with simple code for generating leads automatically into the software
- Email integration for creating leads
- Automatic assignment of queries to specific users
- Zipdial integration (third party telephonic service) for automatic capturing of leads through calls
- Web service APIs to integrate to any external systems



Access Maple Anytime, Anywhere



Do you always have the access to all of your company's information?

With Maple CRM, you can leave behind the constraints of your desk. Since it is cloud based, you have access to all your data and information no matter where you are! With its 24x7 access to the software, it is easy to handle all your business activities at one place.

Be available to your customer always. Your business lies there...

Sales and Lead Generation with Maple

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For improving Sales and Business, one need to have an efficient business model and processes that should be followed by every individual. Along with it, various marketing techniques and ideas that has to be implemented and managed well.

Maple CRM system provides new and best methodologies to companies in raising the capabilities of their sales force. The software enables to analyze the sales life cycle and helps in managing the sales from first to last.

Capturing and nurturing a customer's interest is of prime importance in Maple. Maple enables business owners to streamline and organize the process of converting the prospective customers into clients.

Customer Service using Maple CRM

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In today's business environment, customers are demanding for a higher level of customer service. The customer service executives need to be empowered with all the information related to the customer at their finger tips. With CRM, you can view and manage customer accounts, activities and history.

Manage your business process quickly and accurately by mapping multiple departments. Employees can deliver consistent and efficient customer service with easy sharing of customer information. Maple's single page administration module provides a complete and updated view of customer information across the business.

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*"How you gather, manage and use information will determine
whether you win or lose." -Bill Gates*