



# meet maple

Where personal growth takes root

## Get to Know the Maple Pro Client Tile

### Client Tile Basics

When your client accepts your Maple Pro invitation they get their own tile on your Maple Pro Dashboard. It shows the name you gave them in the invitation and how long you have been connected in Maple. Click into the Badges or the Next Step bar to see additional information.



#### Shared By:

Shows a count of the Maple Stuff shared by this client with you. These can be any Stuff Type the client uses in Maple.



#### Client Notes:

Shows a count of the Notes about this client that you've added to Maple. *These are only visible to you.*



#### Next Steps:

Shows a count of all of the Next Steps that have been assigned to this client.



#### Add Next Steps:

Quickly assign a client additional Next Steps right from the tile.

### Status Key

**Assigned, not Accepted:** You've created the Next Step but your client has not confirmed it. Appears as grey.

**Active/In Progress:** Your client accepted it and its working on it. Appears as yellow when there is progress.

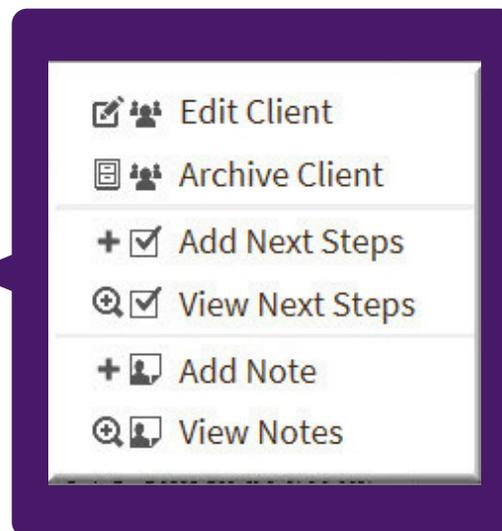
**Declined by Client:** Oops! Your client opted not to work on this. Appears as dark red.

**Missed:** Your client was working on this but didn't complete it in time. Appears as light red.

**Achieved!:** Woo hoo! Your client completed this Next Step. Appears as green.

## Client Tile Quick Menu

The Quick Menu gives you additional options to view or manage your client information.



## Menu Options

**Edit Client:** Allows you to update the name you've given the client in Maple.

**Archive Client:** When you've wrapped things up with this client you can move them to your Client Archives. This allows you to keep just the active clients on your Pro Dashboard but retain all of the information for the client in case you work with them again.

**Add Next Steps:** Works just like the Add Next Step button. Use it to place tasks on your client's Maple Dashboard.

**View Next Steps:** Goes to the Next Steps page for a quick look at all of the Next Steps for that client.

**Add Note:** Allows you to quickly add a Client Note for this client.

**View Notes:** Takes you to the Client Notes page for this client where you can see all of the notes you've added.



## Still Have Questions?

No problem! We're here for you! Go to the My Maple menu and select *Help!* Send us a system message or an email with your questions and we'll get you Mapling in no time.