



# Mandates Portal

## Sales Management

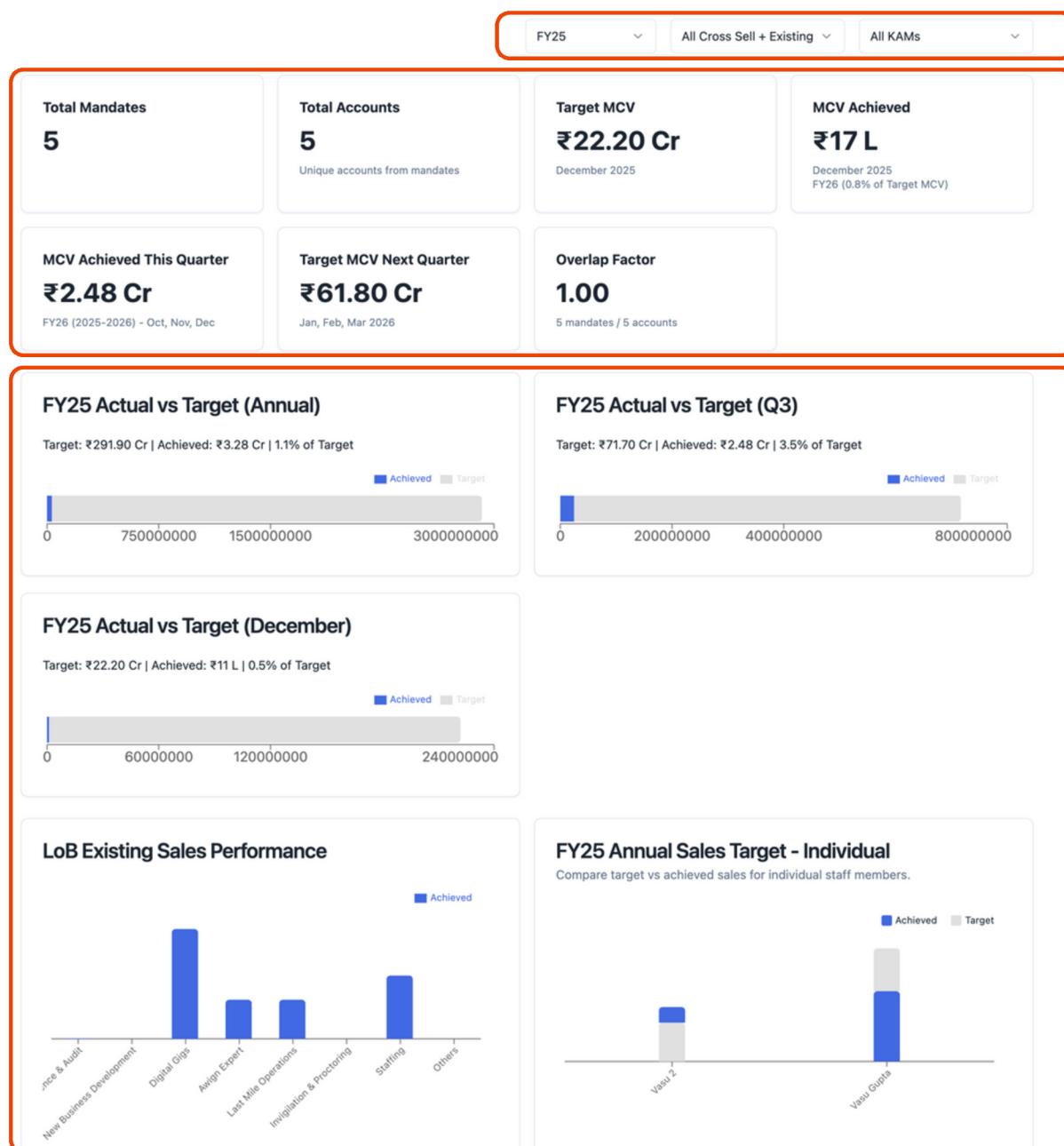
User Guide

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# Dashboard


**Filters**
**Summary Cards**
**Performance Analytics**

**Note:**  
Hover on graphs to know more.

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# Dashboard

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Administration

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Sign Out

**MCV Tier**

Category	Tier	Type	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025
MCV Tier	Tier 1	Target	₹0	₹0	₹0	₹0	₹0	₹4.80 Cr	₹4.80 Cr	₹4.80 Cr	₹4.80 Cr
		Actual	₹0	₹65,000	₹65,000	₹80,65 L	₹80,65 L	₹80,65 L	₹80,65 L	₹1.41 Cr	₹1.41 Cr
		Achievement	0.0%	0.0%	0.0%	0.0%	0.0%	16.8%	16.8%	29.3%	29.3%
		Remaining	₹0	₹-,65,000	₹-,65,000	₹-,80,65,000	₹-,80,65,000	₹3.99 Cr	₹3.99 Cr	₹3.39 Cr	₹3.39 Cr
MCV Tier	Tier 2	Target	₹0	₹0	₹0	₹4.80 Cr	₹4.80 Cr	₹4.80 Cr	₹9.60 Cr	₹18.90 Cr	₹23.70 Cr
		Actual	₹0	₹0	₹0	₹900	₹2,000	₹3,800	₹20.05 L	₹1.71 Cr	₹1.82 Cr
		Achievement	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	9.0%	7.7%
		Remaining	₹0	₹0	₹0	₹4.80 Cr	₹4.80 Cr	₹4.80 Cr	₹9.40 Cr	₹17.19 Cr	₹21.88 Cr

Filter by MCV Tier: All MCV Tiers

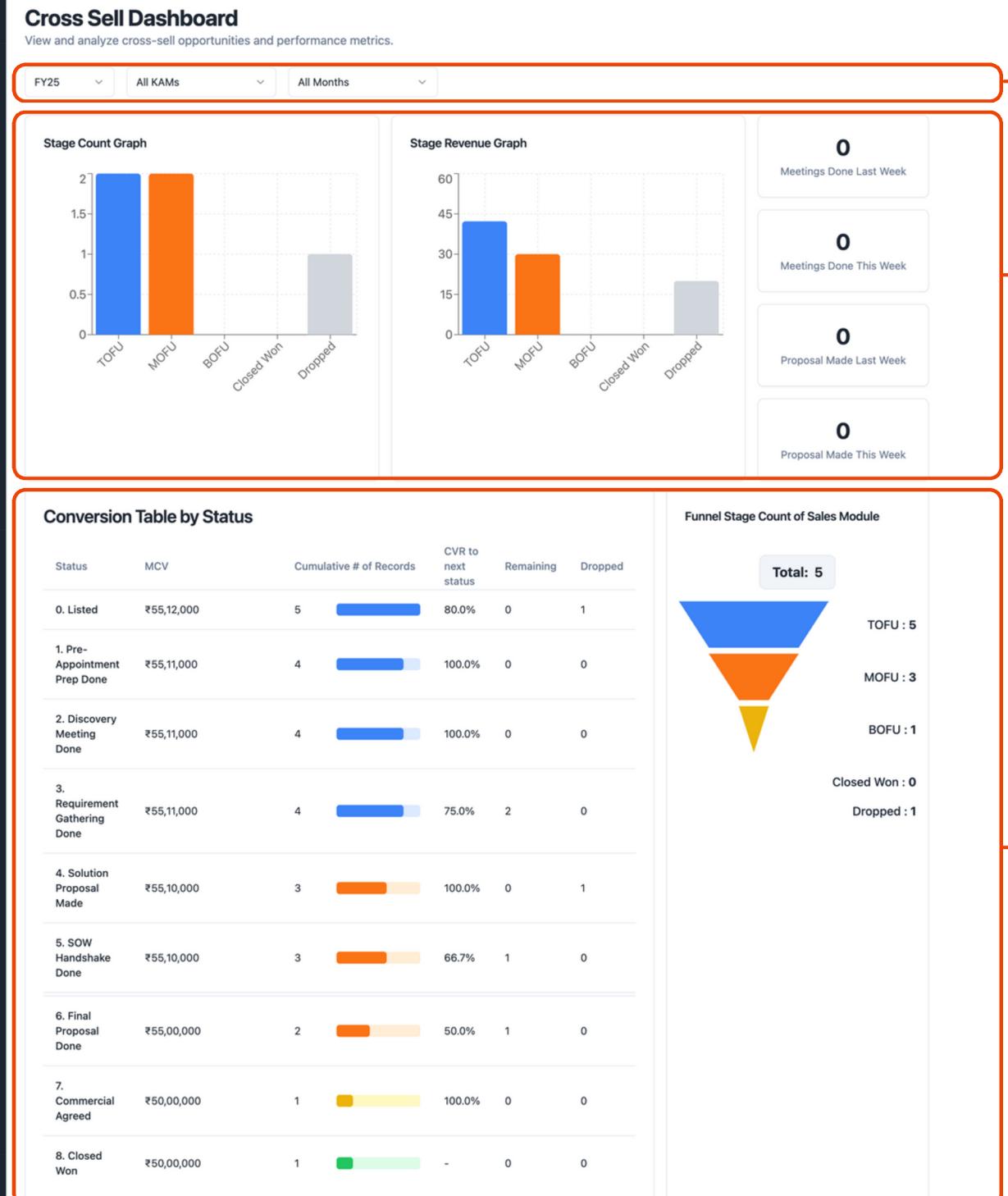
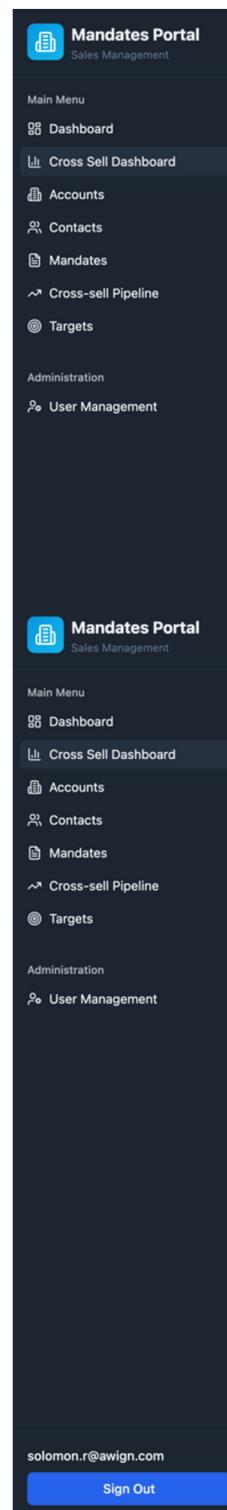
Upsell - For Status Checking (Group B)				Upsell - For Status Checking (Group C)			
Upsell Status	Count of Mandate	Sum of Revenue	Count of Account (Unique)	Upsell Status	Count of Mandate	Sum of Revenue	Count of Account (Unique)
Not Started	1	₹1,000	1	Not Started	0	₹0	0
Ongoing	0	₹0	0	Ongoing	0	₹0	0
Done	1	₹50,000	1	Done	0	₹0	0
Not Set	0	₹0	0	Not Set	0	₹0	0

Upsell Performance									
Group	Prev Month (Count of Mandate)	Current Month (Count of Mandate)	Difference	Prev Month (Sum of Revenue)	Current Month (Sum of Revenue)	Difference	Prev Month (Unique Accounts)	Current Month (Unique Accounts)	Difference
B	2	0	-2	₹51,000	₹0	-51000	2	0	-2
E	2	0	-2	₹5,200	₹0	-5200	2	0	-2
NI	1	0	-1	₹14,400	₹0	-14400	1	0	-1
Total	5	0	-5	₹70,600	₹0	-70600	4	0	-4

MCV Tier Performance Table

Upsell Performance Table

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**Filters**
**Stage Count Chart**
**Conversion Table by Status**

**Note:**  
Hover on graphs to know more.

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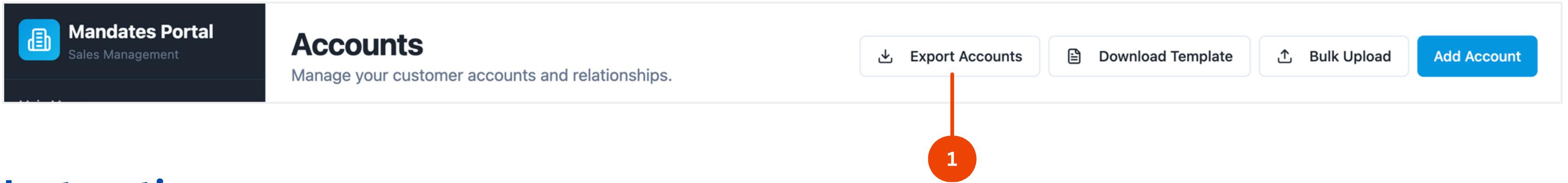
Mandates

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# Export Accounts



The screenshot shows the 'Accounts' section of the Mandates Portal. On the left, there's a sidebar with a 'Mandates Portal Sales Management' icon. The main area has a title 'Accounts' and a subtitle 'Manage your customer accounts and relationships.' Below the title are four buttons: 'Export Accounts' (highlighted with a red circle containing the number '1'), 'Download Template', 'Bulk Upload', and 'Add Account'.

## Instructions

**Step 1:** Click the “Accounts” button in the left navigation panel.

**Step 2:** Click the “Export Accounts” button.  **1**

**Step 3:** After clicking, .csv file will be downloaded with the name: **accounts\_export\_year/month/date.csv**

Dashboard

Cross Sell Dashboard

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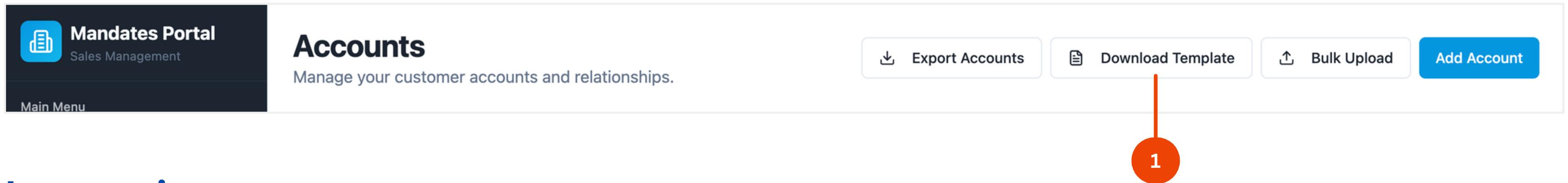
Mandates

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# Download Template



The screenshot shows the 'Accounts' page of the Mandates Portal. On the left, there's a dark sidebar with the 'Mandates Portal' logo and 'Sales Management' text. The main area has a title 'Accounts' and a subtitle 'Manage your customer accounts and relationships.' Below the title are four buttons: 'Export Accounts' (with a download icon), 'Download Template' (highlighted with a red circle and the number 1), 'Bulk Upload' (with an upload icon), and 'Add Account' (in blue). A red arrow points from the top right towards the 'Download Template' button.

## Instructions

**Step 1:** Click the “Accounts” button in the left navigation panel.

**Step 2:** Click the “Download Template” button. 1

**Step 3:** After clicking, .csv file will be downloaded with the name: **accounts\_upload\_template.csv**

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# Bulk Upload Instructions

**Step 1:** Open the downloaded **accounts\_upload\_template.csv**

**Step 2:** Update the data in its respective column. **1**

Do not modify the columns' arrangement.

**Step 3:** Scroll to columns M and N. **2** Use the reference content to avoid typos and case-sensitive errors. Save the file.

**Step 4:** Open the Mandate portal. Click the “**Accounts**” button in the left navigation panel.

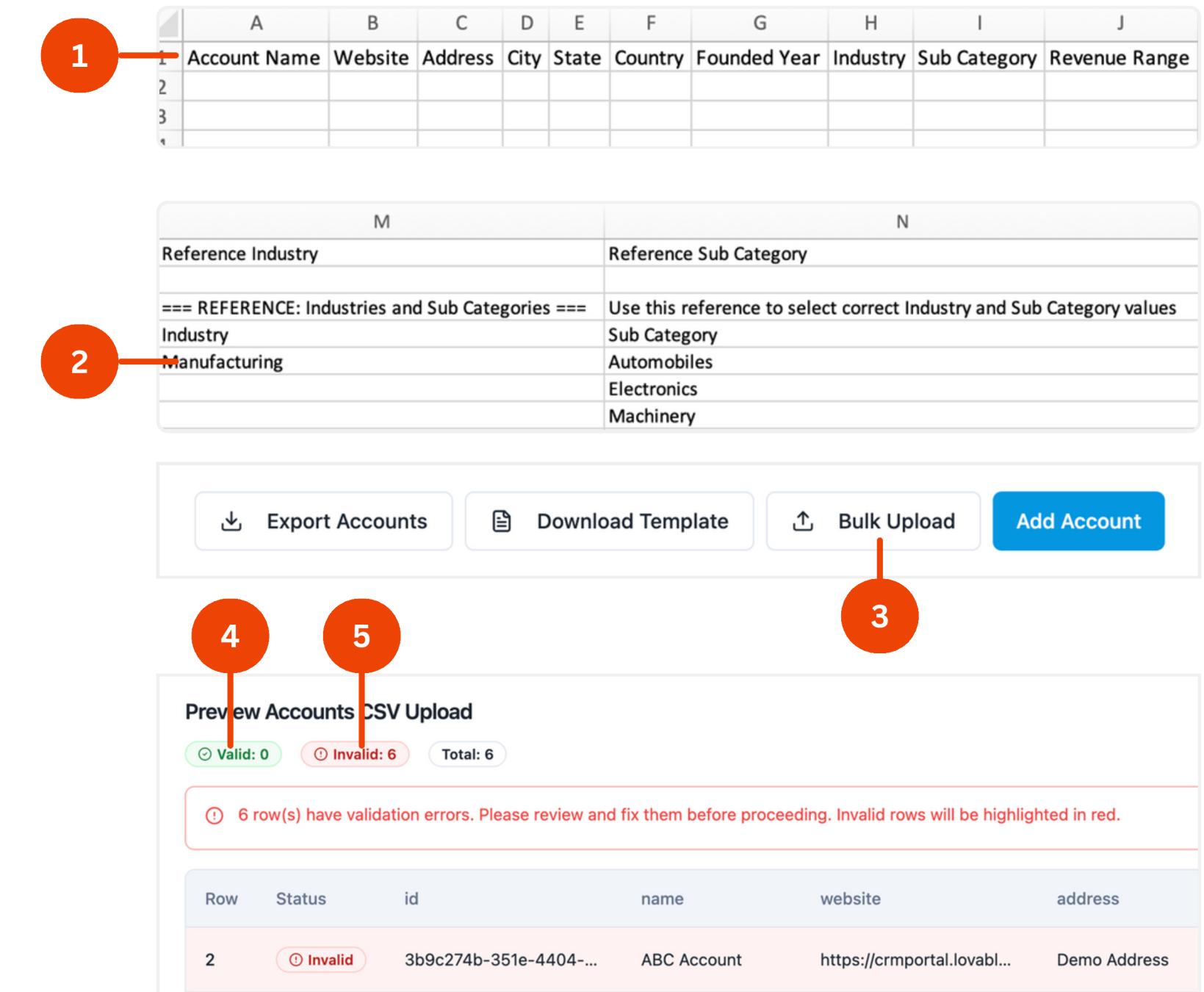
**Step 5:** Click the “**Bulk Upload**” button. **3**

**Step 6:** Browse the .csv file you want to upload from your device.

**Step 6:** Preview Accounts CSV Upload popup opens.

Make sure all rows are valid **4** with **zero** invalid rows **5**

**Step 7:** When all rows are Valid, “**Upload Entry**” button gets enabled. Click to Upload.



Dashboard

Cross Sell Dashboard

**Accounts**

Contacts

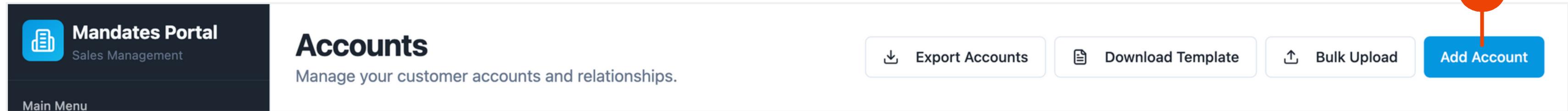
Mandates

Cross Sell Pipeline

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User Management

# Add Account



**Mandates Portal**  
Sales Management

**Accounts**  
Manage your customer accounts and relationships.

Export Accounts | Download Template | Bulk Upload | **Add Account**

## Instructions

**Step 1:** Click the “Accounts” button in the left navigation panel.

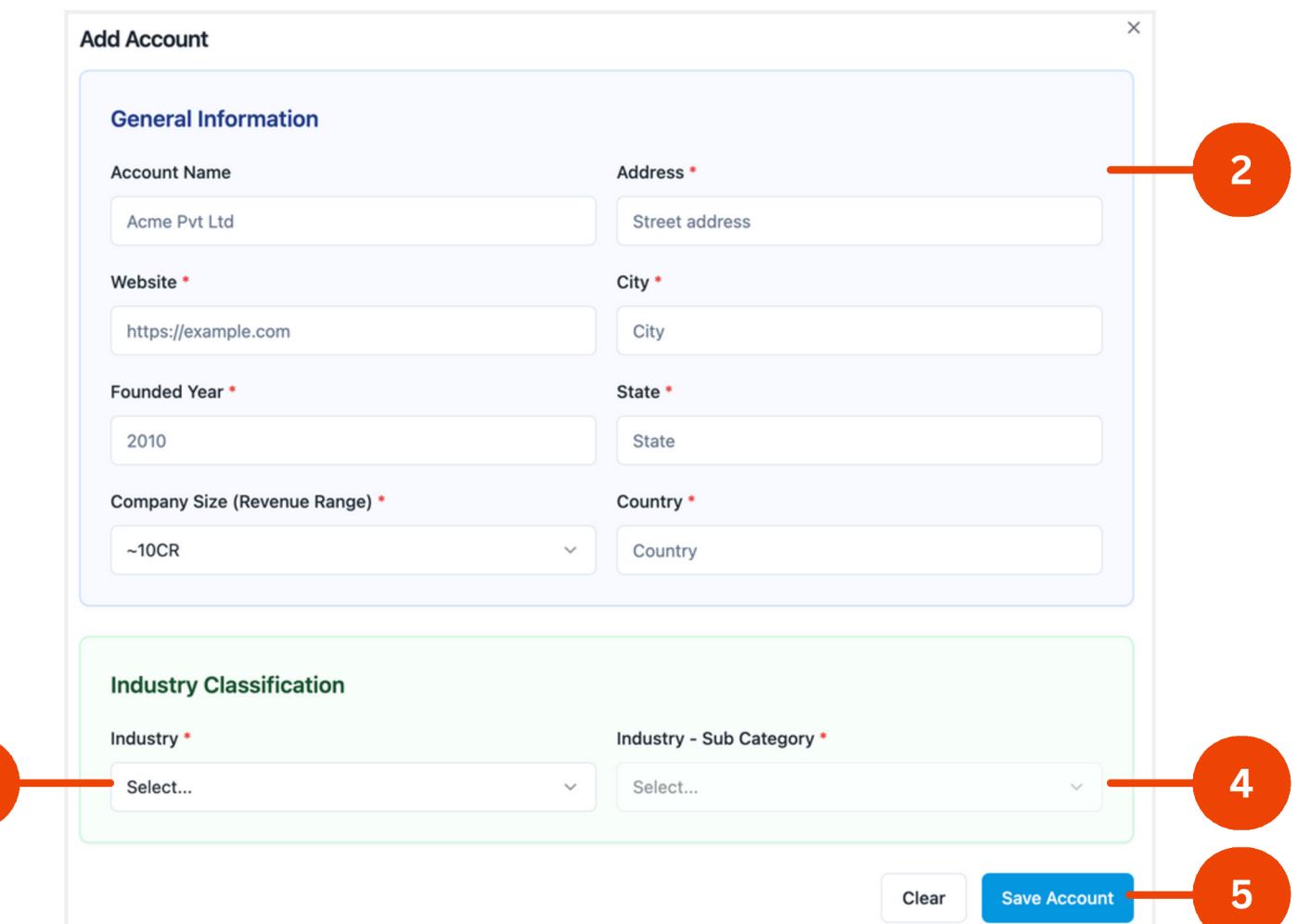
**Step 2:** Click the “Add Account” button. **1**

**Step 3:** Add Account popup opens.

Under General Information section, fill all the required input fields. **2**

**Step 3:** Under Industry Classification section,  
select Industry **3** to enable Industry - Sub Category field. **4**

**Step 4:** Click “Save Account” Button. **5**



**Add Account**

**General Information**

Account Name **Acme Pvt Ltd** Address \* **Street address**

Website \* **https://example.com** City \*

Founded Year \* **2010** State \*

Company Size (Revenue Range) \* **~10CR** Country \*

**Industry Classification**

Industry \* **Select...** Industry - Sub Category \* **Select...**

Clear | **Save Account**

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# Filters



- 1 Based on Account name (Client Name)
- 2 Based on country
- 3 Based on industry (Eg: FMCG, Manufacturing, etc.,)
- 4 Based on Revenue range
- 5 Based on MCV Tiers
- 6 Based on Company Tiers

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# List view

Account Name	Address	City	State	Country	Founded Year	Industry	Sub Category	Revenue Range	Total ACV	Total MCV	MCV Tier	Company Size Tier	Actions
ABC Account 	Demo Address	Ashok Vihar	Bangalore	India	2005	Services	Consulting	50CR~100CR	0	0	Tier 2	Tier 2	<a href="#">View Details</a> 

1

2

3

- 1 On click, the icon will navigate to the client's website.
- 2 On click, you can view the complete details of the account.
- 3 On click, the Account can be deleted.

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# Edit Account

## Instructions

**Step 1:** Click the “Accounts” button in the left navigation panel.

**Step 2:** Under list view, scroll to right, and click on “View Details” button. 

**Step 3:** Add Account popup opens. Click on “Edit” button. 

**Step 4:** All details turn to editable fields. After updating, click “Save Changes”. 

Sub Category	Revenue Range	Total ACV	Total MCV	MCV Tier	Company Size Tier	Actions
Consulting	50CR~100CR	0	0	Tier 2	Tier 2	<a href="#">View Details</a> 

ABC Account

**General Information**

Account Name:	Address:
ABC Account	Demo Address
Website:	City:
<a href="https://crmportal.lovable.app/">https://crmportal.lovable.app/</a>	Ashok Vihar

ABC Account

**General Information**

Account Name:	Address:
<input type="text" value="ABC Account"/>	<input type="text" value="Demo Address"/>
Website:	City:

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# Delete Account

## Instructions

**Step 1:** Click the “Accounts” button in the left navigation panel.

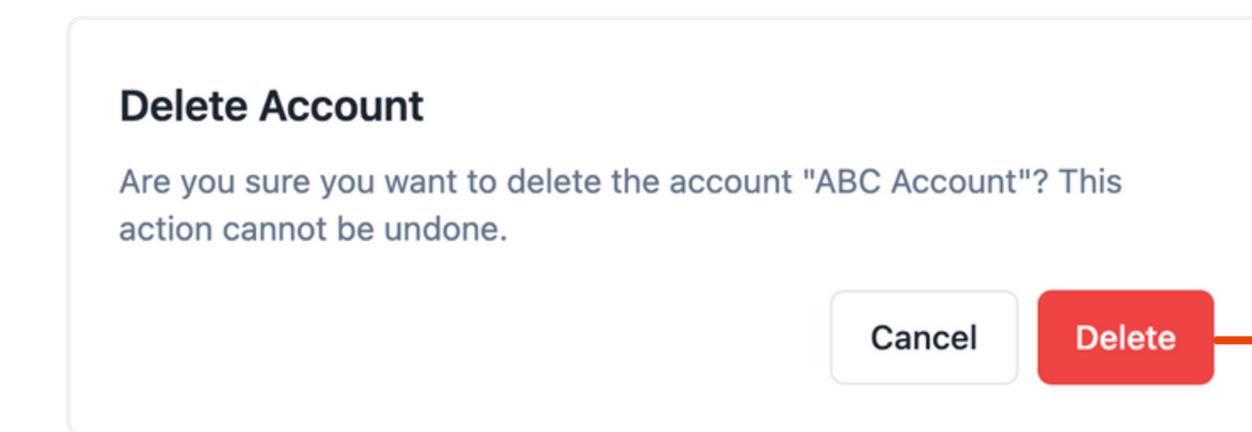
Total ACV	Total MCV	MCV Tier	Company Size Tier	Actions
0	0	Tier 2	Tier 2	<a href="#">View Details</a> 

1

**Step 2:** Under list view, scroll to right, and click on “Bin” icon. 

**Step 3:** Delete Account confirmation popup opens.

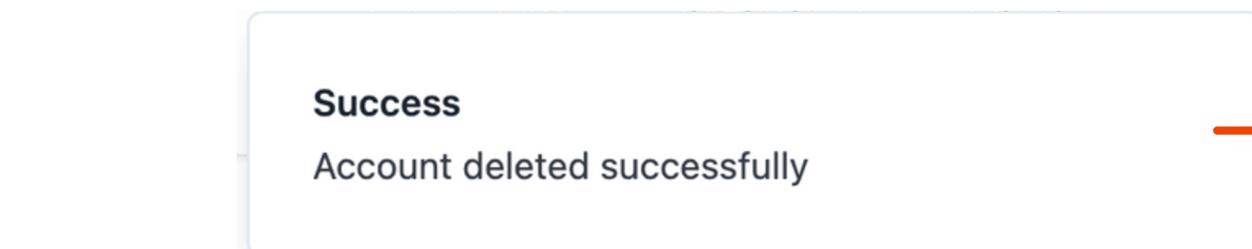
Click on “Delete” button. 



Cancel

Delete

**Step 4:** Account has been successfully deleted with a toast message at the bottom right. 



3

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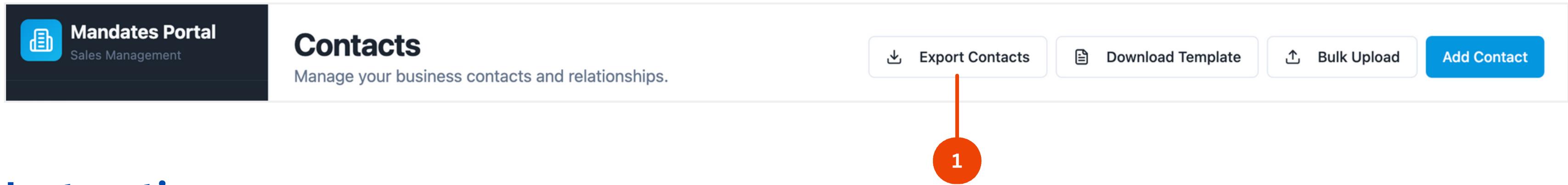
Mandates

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# Export Contacts



The screenshot shows the 'Mandates Portal Sales Management' interface. In the top navigation bar, the 'Contacts' button is highlighted in blue. Below the navigation, the main content area has a dark header with the word 'Contacts' and a subtitle 'Manage your business contacts and relationships.' To the right of the subtitle are four buttons: 'Export Contacts' (highlighted with a red circle containing the number '1'), 'Download Template', 'Bulk Upload', and 'Add Contact'.

## Instructions

**Step 1:** Click the “Contacts” button in the left navigation panel.

**Step 2:** Click the “Export Contacts” button. 1

**Step 3:** After clicking, .csv file will be downloaded with the name: **contacts\_export\_year/month/date.csv**

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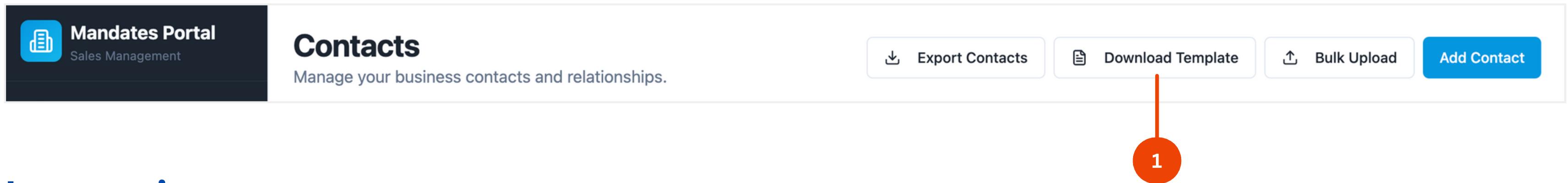
Mandates

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# Download Template



The screenshot shows the 'Mandates Portal Sales Management' interface. In the top navigation bar, the 'Contacts' button is highlighted in blue. Below the navigation, the 'Contacts' section is displayed with the sub-instruction: 'Manage your business contacts and relationships.' To the right of this section are four buttons: 'Export Contacts' (with a downward arrow icon), 'Download Template' (with a document icon, highlighted with a red circle and the number 1), 'Bulk Upload' (with an upward arrow icon), and 'Add Contact' (in a blue button). A vertical red line points from the top of the 'Download Template' button down to the red circle.

## Instructions

**Step 1:** Click the “Contacts” button in the left navigation panel.

**Step 2:** Click the “Download Template” button. 1

**Step 3:** After clicking, .csv file will be downloaded with the name: **contacts\_upload\_template.csv**

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# Bulk Upload Instructions

**Step 1:** Open the downloaded **contacts\_upload\_template.csv**

**Step 2:** Update the data in its respective column. 1

Do not modify the columns' arrangement.

**Step 3:** Scroll to columns Q and R. 2 Use the reference content to avoid typos and case-sensitive errors. Save the file.

**Step 4:** Open the Mandate portal. Click the “**Contacts**” button in the left navigation panel.

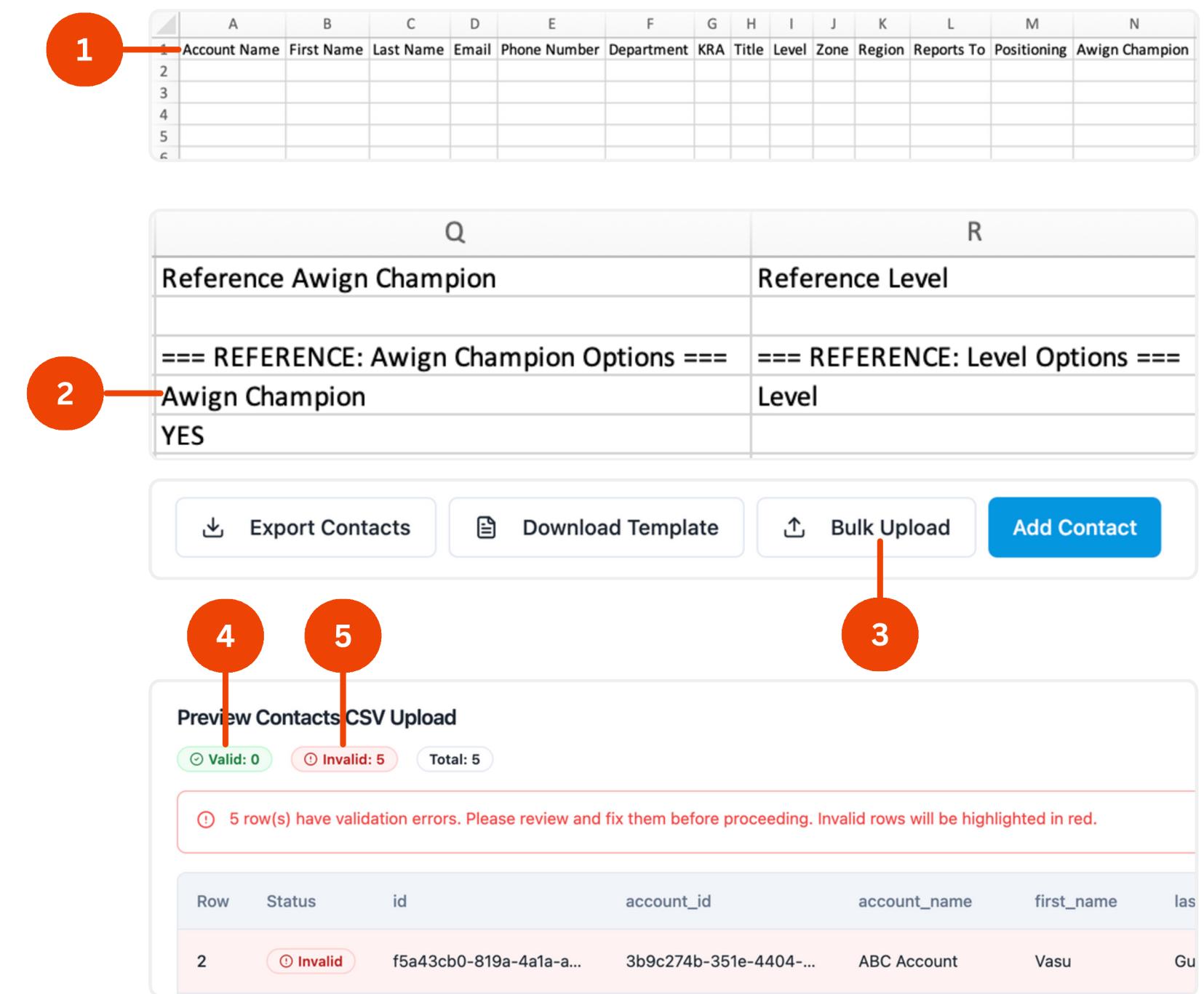
**Step 5:** Click the “**Bulk Upload**” button. 3

**Step 6:** Browse the .csv file you want to upload from your device.

**Step 6:** Preview Contacts CSV Upload popup opens.

Make sure all rows are valid 4 with zero invalid rows 5

**Step 7:** When all rows are Valid, “**Upload Entry**” button gets enabled. Click to Upload.



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**Contacts**

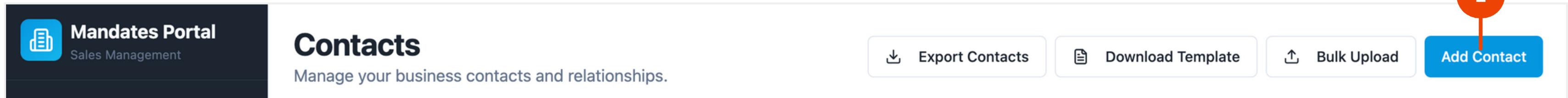
Mandates

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# Add Contact



**Mandates Portal**  
Sales Management

## Contacts

Manage your business contacts and relationships.

**Add Contact**

Export Contacts | Download Template | Bulk Upload

## Instructions

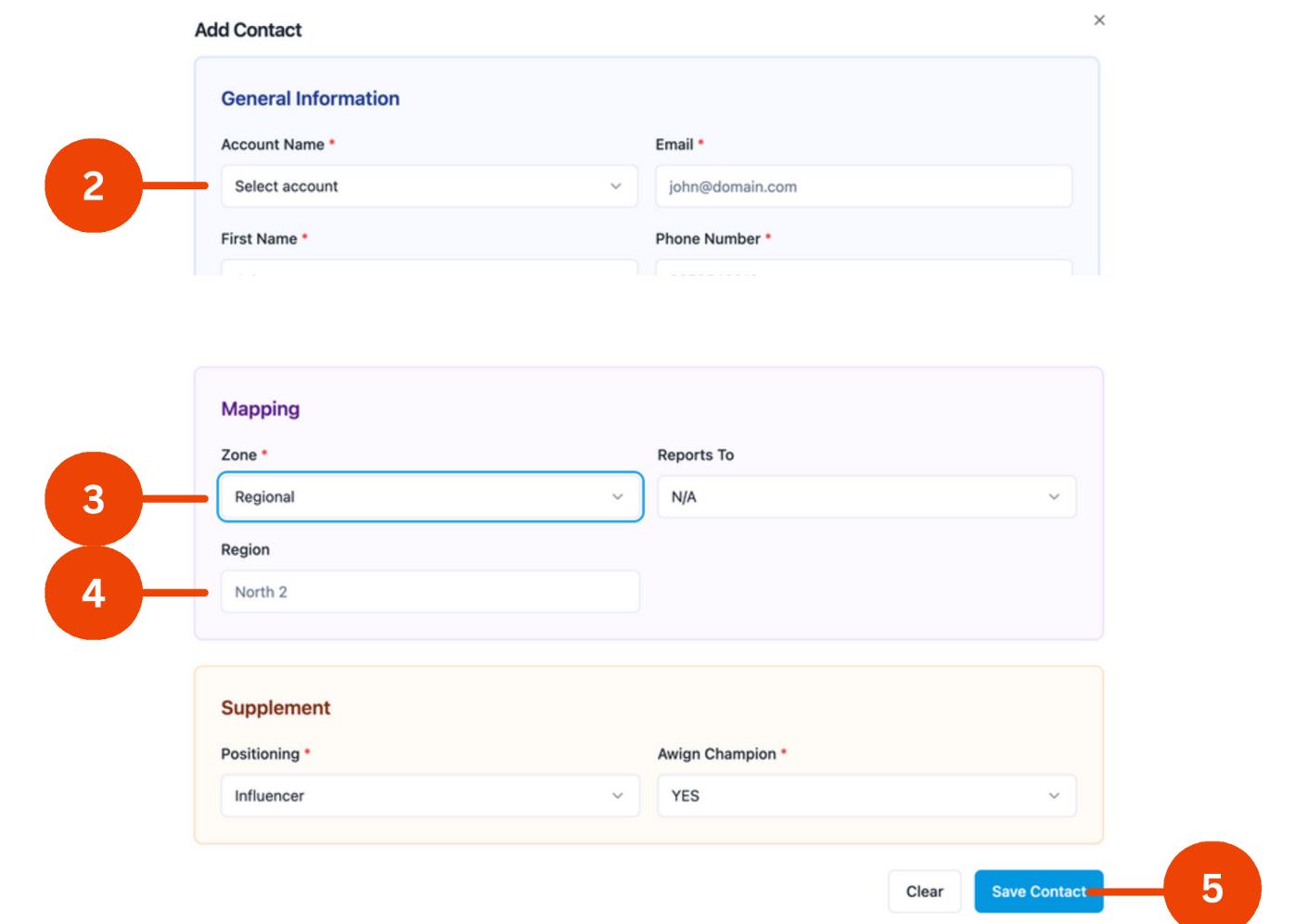
**Step 1:** Click the “Contacts” button in the left navigation panel.

**Step 2:** Click the “Add Contact” button. **1**

**Step 3:** Add Contact popup opens. Fill all the required input fields **2**

**Step 3:** Under Mapping section, **Zone** selection **3** is conditional, which enables **4** **Region** field. Fill all the required input fields.

**Step 4:** Click “Save Contact” Button **5**



**Add Contact**

**General Information**

Account Name \* Email \*

Select account john@domain.com

First Name \* Phone Number \*

**Mapping**

Zone \* Reports To

Region N/A

North 2

**Supplement**

Positioning \* Awign Champion \*

Influencer YES

Clear Save Contact **5**

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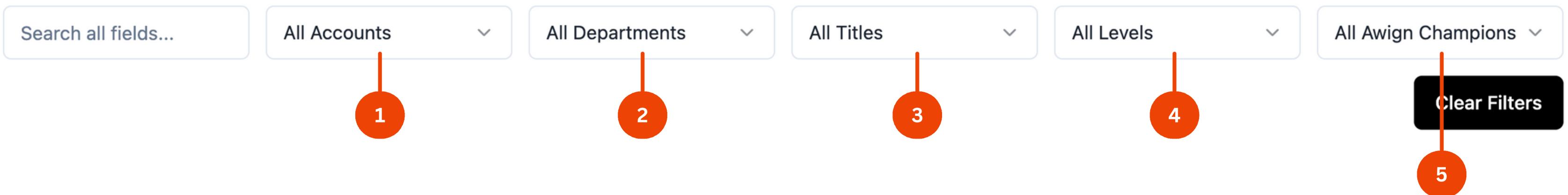
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# Filters



- 1 Based on Account name (Client Name)
- 2 Based on Departments
- 3 Based on Titles (Eg: CA, Product Manager, etc.,)
- 4 Based on Levels
- 5 Based on Awign Champions (All / Yes / No)

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# List view

Account	Name	Email	Phone	Title	Level	Awign Champion	Actions
ABC Account	Vasu Gupta	vasu.gupta@awign.com	9870223496	Product Manager	Lv.1	YES	<a href="#">View Details</a>  <span>1</span> <span>2</span>

- 1 On click, you can view the complete details of the contact.
- 2 On click, the contact can be deleted.

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# Edit Contact

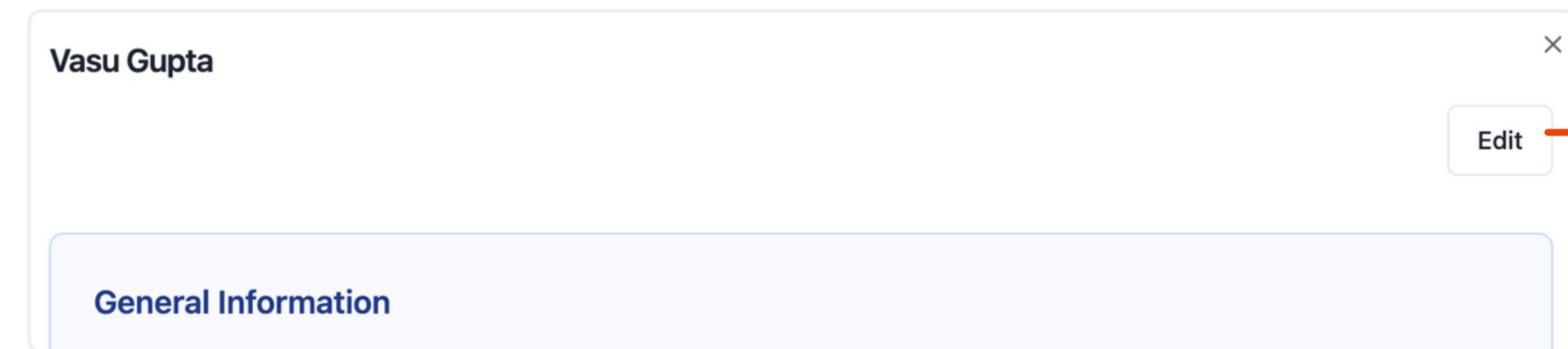
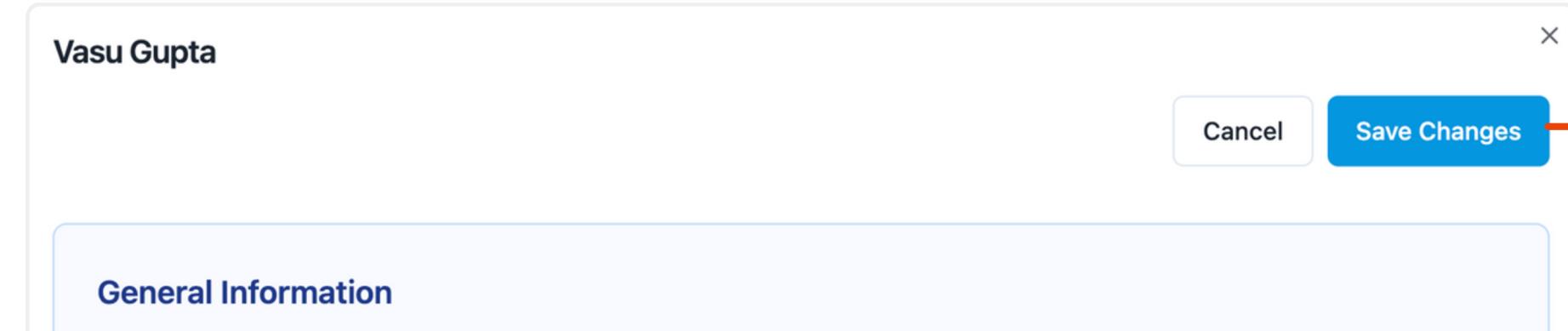
## Instructions

**Step 1:** Click the “Contacts” button in the left navigation panel.

**Step 2:** Under list view, scroll to right, and click on “View Details” button. 

**Step 3:** Detailed view of the contact popup opens. Click on “Edit” button. 

**Step 4:** All details turn to editable fields. After updating, click “Save Changes”. 

Phone	Title	Level	Awign Champion	Actions
9870223496	Product Manager	Lv.1	YES	<a href="#">View Details</a>   

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# Delete Contact

## Instructions

**Step 1:** Click the “Contacts” button in the left navigation panel.

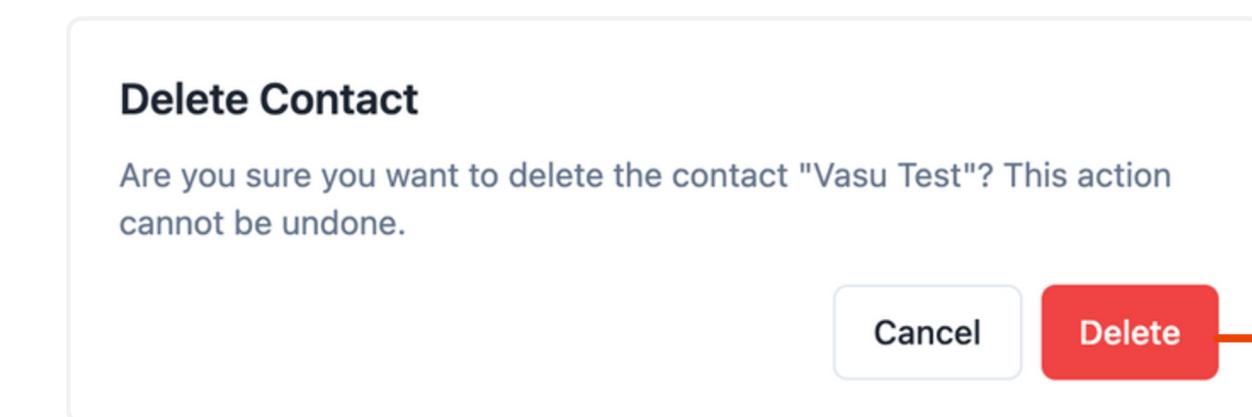
Total ACV	Total MCV	MCV Tier	Company Size Tier	Actions
0	0	Tier 2	Tier 2	<a href="#">View Details</a> 

1

**Step 2:** Under list view, scroll to right, and click on “Bin” icon. 

**Step 3:** Delete Contact confirmation popup opens.

Click on “Delete” button. 

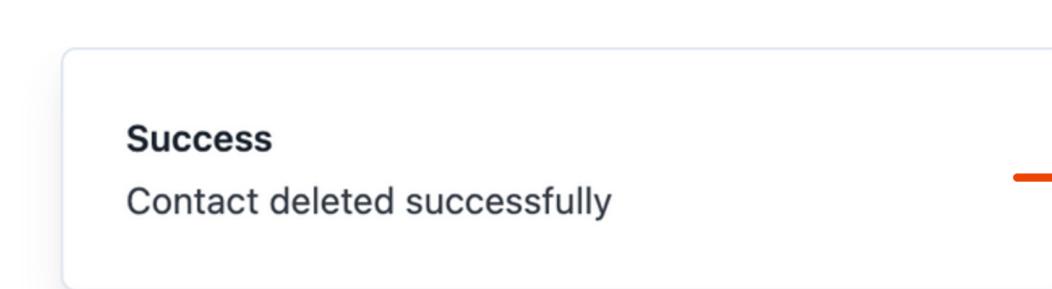


Cancel

Delete

2

**Step 4:** Contact has been successfully deleted with a toast message at the bottom right. 



Success

Contact deleted successfully

3

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Contacts

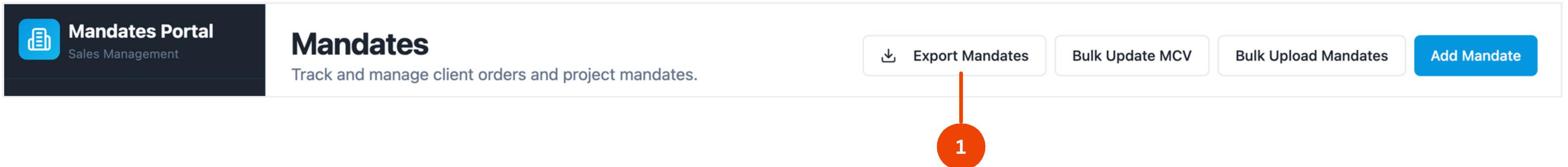
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# Export Mandates



## Instructions

**Step 1:** Click the “**Mandates**” button in the left navigation panel.

**Step 2:** Click the “**Export Mandates**” button. **1**

**Step 3:** After clicking, **.csv file** will be downloaded with the name: **mandates\_export\_year/month/date.csv**

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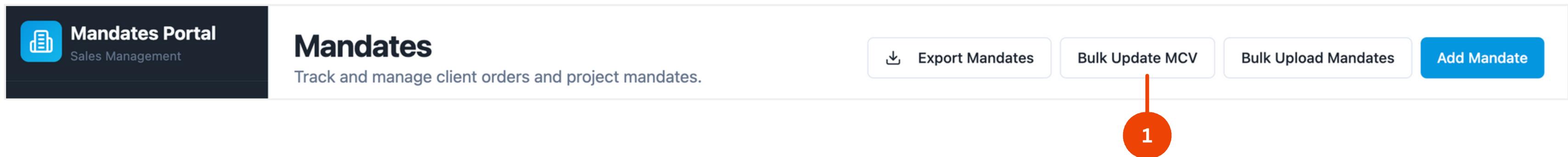
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# Download Template of Bulk Upload MCV



## Instructions

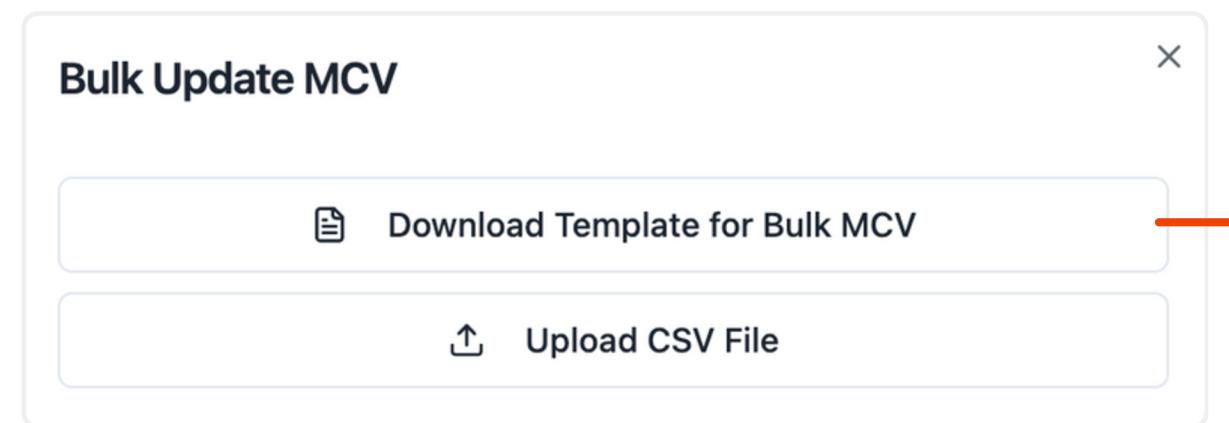
**Step 1:** Click the “**Mandates**” button in the left navigation panel.

**Step 2:** Click the “**Bulk Upload MCV**” button. 

**Step 3:** Bulk Update MCV popup opens.

Click the “**Download Template of Bulk Upload MCV**” 

After clicking, .csv file will be downloaded with the name:  
**bulk\_mcv\_update\_template.csv**



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# Upload Bulk MCV CSV File

## Instructions

**Step 1:** Open the downloaded **bulk\_mcv\_update\_template.csv**

**Step 2:** Update the data in its respective column. **1**

Do not modify the columns' arrangement.

Save the file.

**Step 4:** Open the Mandate portal. Click the “**Mandates**” button in the left navigation panel.

**Step 5:** Click the “**Bulk Update MCV**” button. **2**

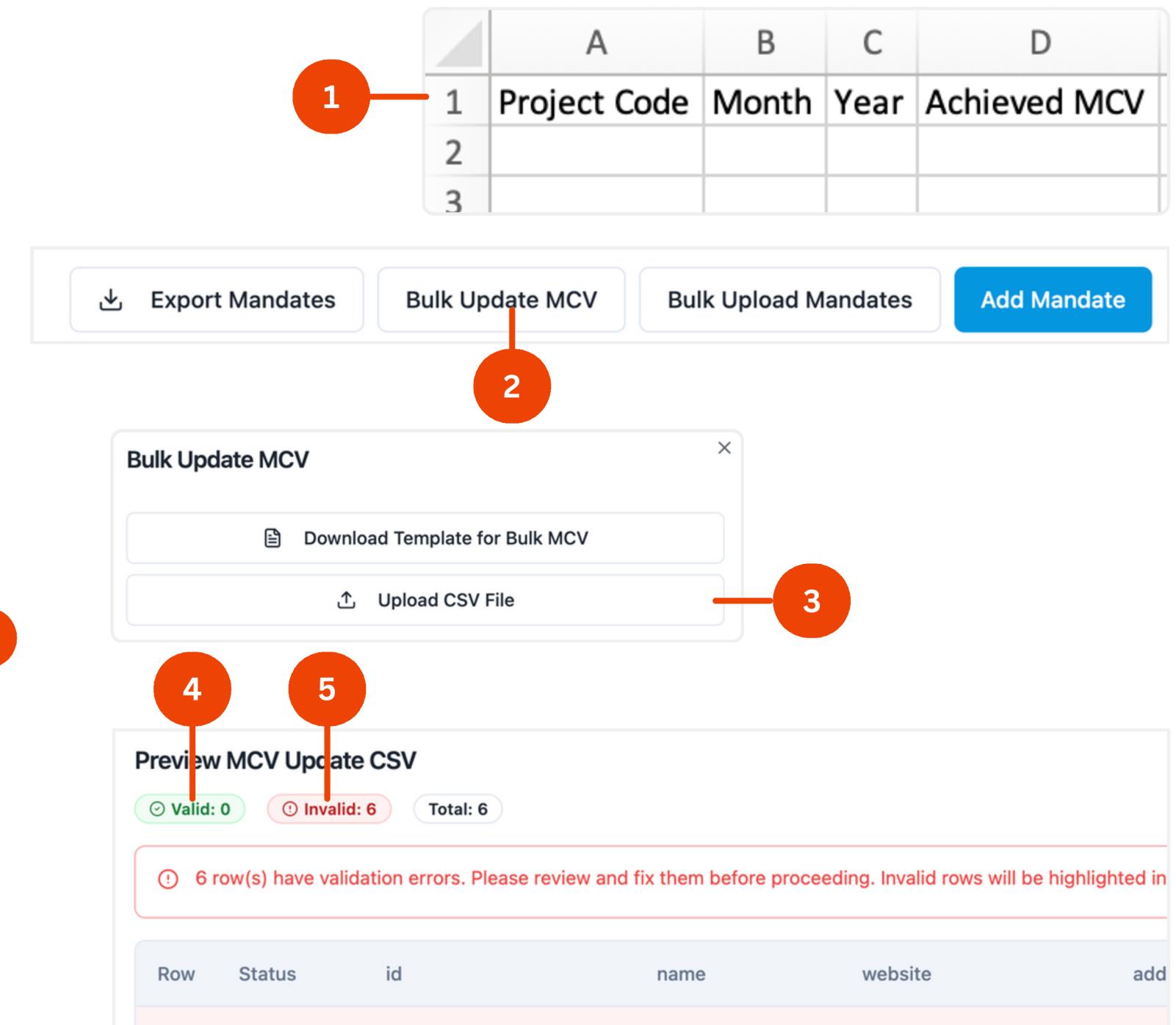
**Step 6:** Bulk Update MCV popup opens. Click “**Upload CSV File**” button. **3**

**Step 6:** Browse the .csv file you want to upload from your device.

**Step 6:** Preview Contacts CSV Upload popup opens.

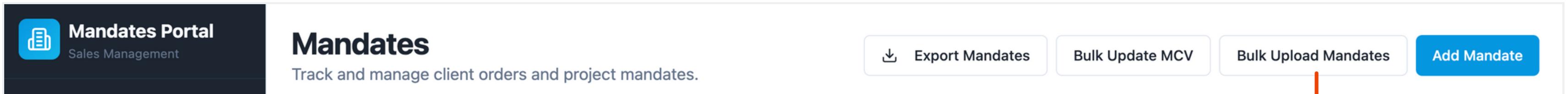
Make sure all rows are valid **4** with **zero** invalid rows **5**

**Step 7:** When all rows are Valid, “**Upload Entry**” button gets enabled. Click to Upload.



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# Download Bulk Upload Mandate Template



## Instructions

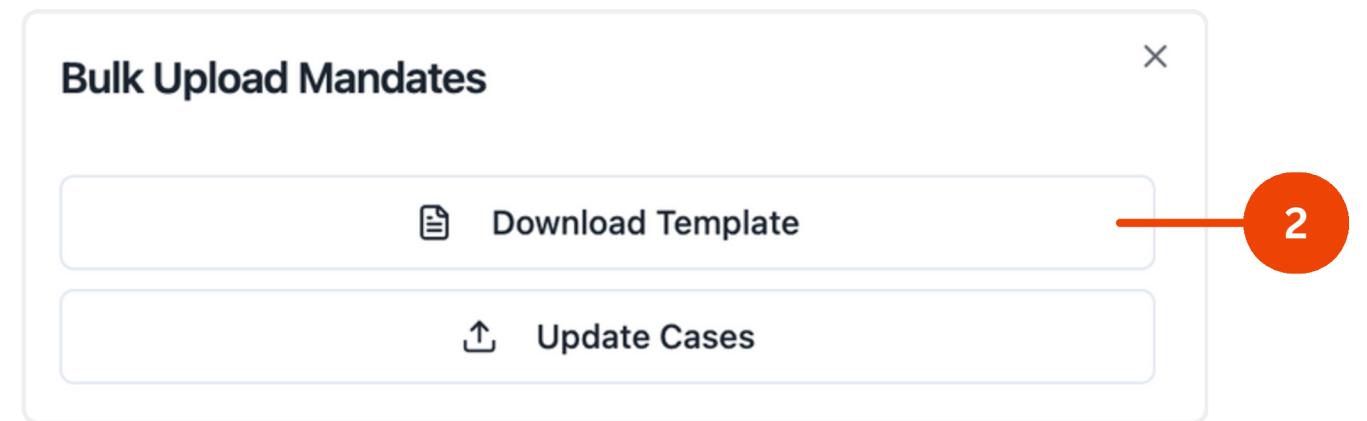
**Step 1:** Click the “Mandates” button in the left navigation panel.

**Step 2:** Click the “Bulk Upload Mandates” button. 1

**Step 3:** Bulk Upload Mandates popup opens.

Click the “Download Template” button. 2

**Step 4:** After clicking, .csv file will be downloaded with the name: **mandates\_upload\_template.csv**



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# Bulk Upload Mandates

## Instructions

**Step 1:** Open the downloaded **mandates\_upload\_template.csv**

**Step 2:** Update the data in its respective column. **1**  
Do not modify the columns' arrangement.

**Step 3:** Scroll right to columns AA **2** Use the reference content  
to avoid typos and case-sensitive errors. Save the file.

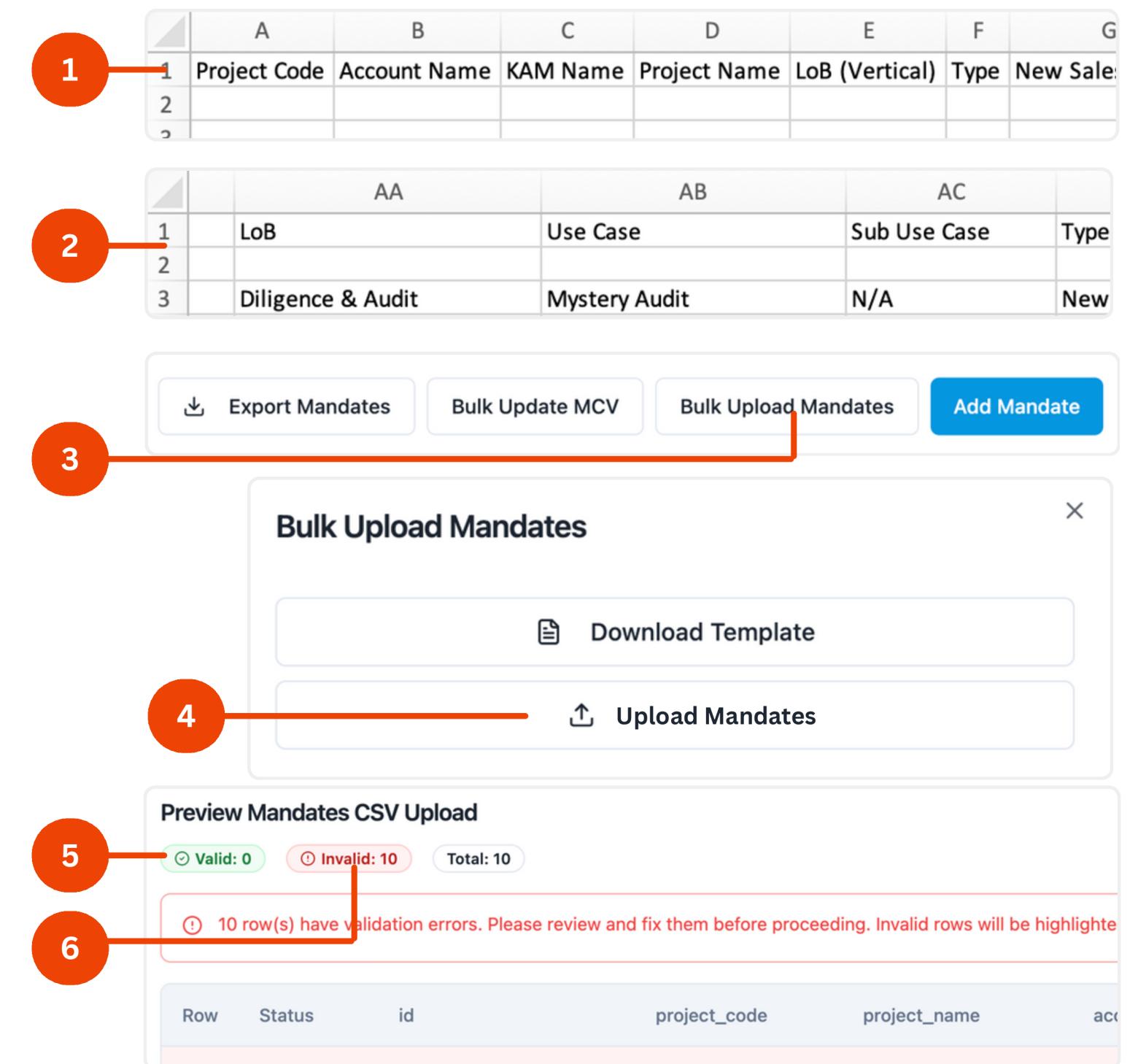
**Step 4:** Open the Mandate portal. Click the “**Mandates**” button in  
left navigation panel. Click “**Bulk Upload Mandate**” **3**

**Step 5:** Bulk Upload Mandates popup opens. Click “**Upload Mandates**” **4**

**Step 6:** Browse the .csv file you want to upload from your device.

**Step 7:** Preview Mandates CSV Upload popup opens.  
Make sure all rows are valid **5** with **zero** invalid rows **6**

**Step 8:** When all rows are Valid, “**Upload Entry**” button gets enabled.  
Click to Upload.



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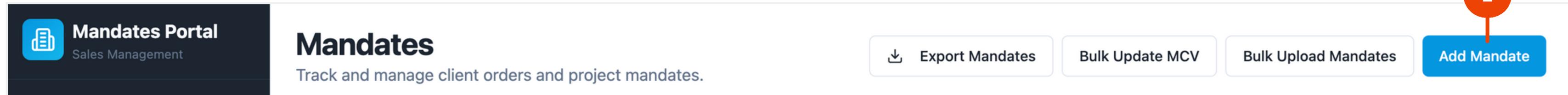
**Mandates**

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# Add Mandate



## Instructions

**Step 1:** Click the “**Mandates**” button in the left navigation panel.

**Step 2:** Click the “**Add Mandate**” button. **1**

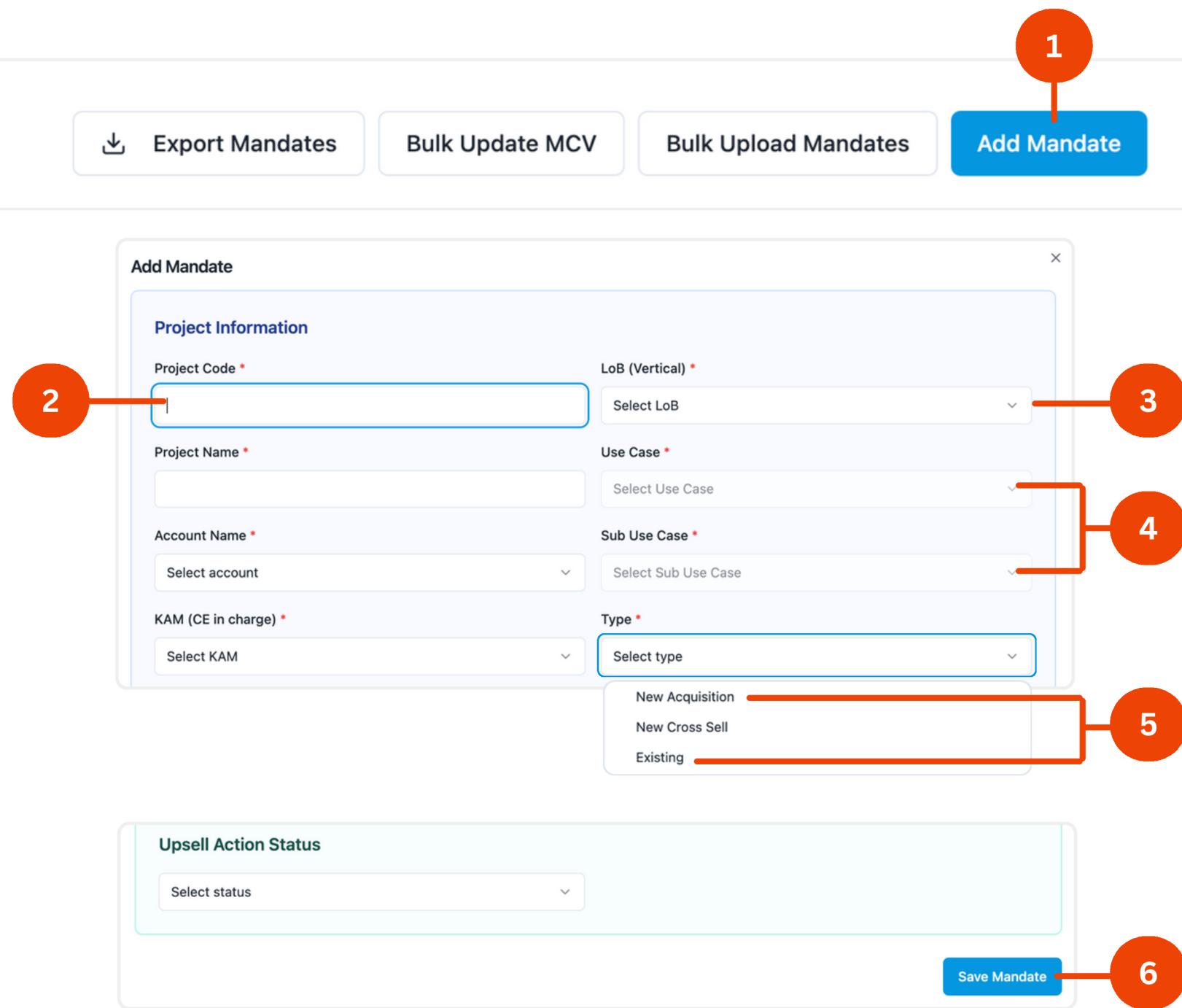
**Step 3:** Add Mandate popup opens. Fill all the required input fields. **2**

**Step 4:** **LoB (Vertical)** **3** is conditional. It's selection reflects on **Use Cases** and **Sub Use Case** field. **4**

**Step 5:** Under **Type** dropdown, **New Acquisition** and **Existing**, **5** will add “**Handover info**” section additionally to the popup.

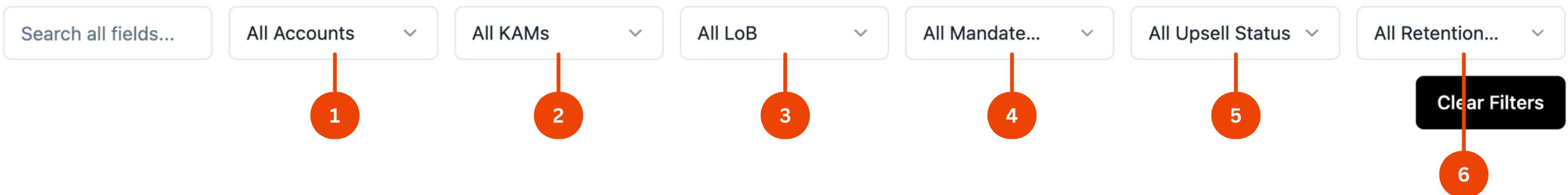
**Step 6:** Fill all the required input fields.

Click “**Save Mandate**” Button **6**



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# Filters



- 1 Based on Account name (Client Name)
- 2 Based on KAM
- 3 Based on LoB
- 4 Based on Mandate Health
- 5 Based on Upsell Status
- 6 Based on Retention Types

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# List view

Project Code	Project Name	Account	KAM	LoB	ACV	MCV	Mandate Health	Upsell Status	Retention Type	Actions
Trial Mandate	Mandate Name Project	ABC Account	Vasu 2	Diligence & Audit	500	4,000	Exceeds Expectations	Ongoing	E	<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <span>View Details</span>    </div> <div style="text-align: center;"> <span>Update</span>    </div> <div style="text-align: center;">     </div> <div style="text-align: center;">  </div> </div>

- 1 On click, you can view the complete details of the mandate.
- 2 On click, the mandate can be updated.
- 3 On click, the mandate can be deleted.

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# Edit Mandate

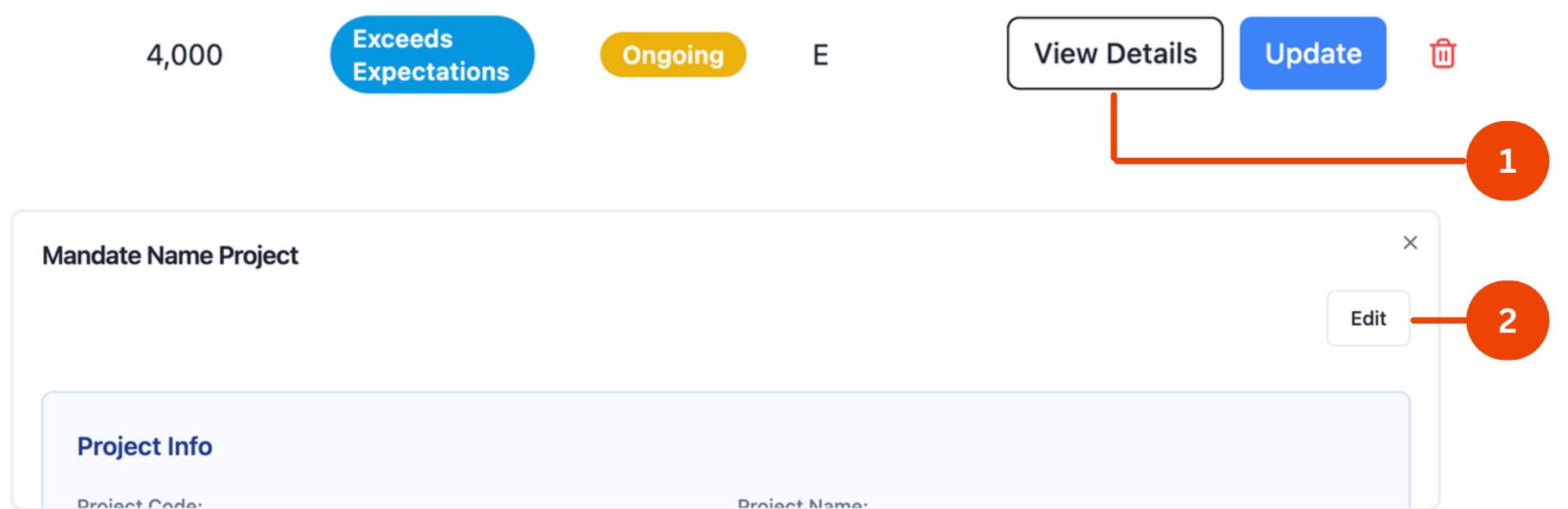
## Instructions

**Step 1:** Click the “Mandates” button in the left navigation panel.

**Step 2:** Under list view, scroll to right, and click on “View Details” button. 

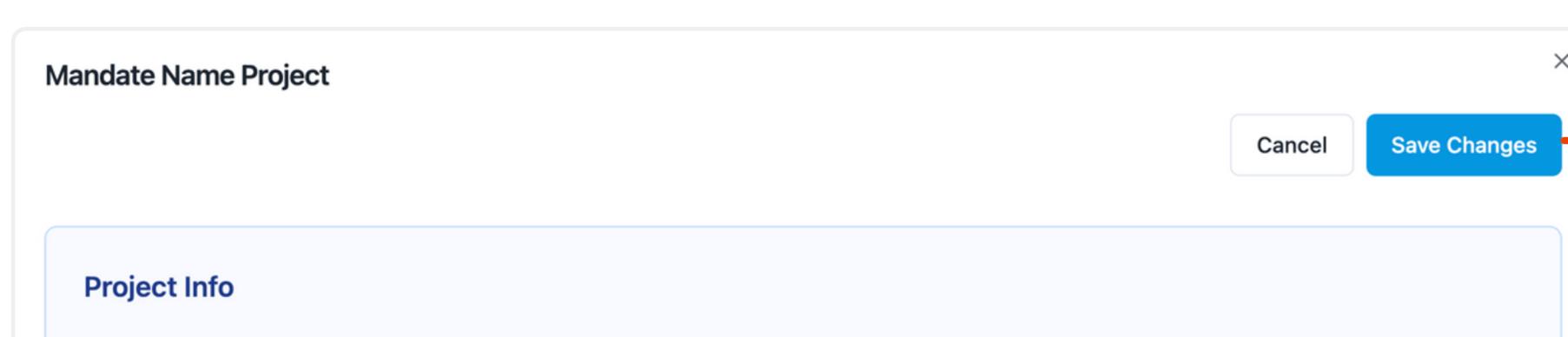
**Step 3:** Mandate’s detail popup opens. Click on “Edit” button. 

**Step 4:** All details turn to editable fields. After updating, click “Save Changes”. 

MCV	Mandate Health	Upsell Status	Retention Type	Actions
4,000	Exceeds Expectations	Ongoing	E	<div style="display: flex; align-items: center;"> <span style="border: 1px solid #ccc; padding: 5px 10px; margin-right: 10px;">View Details</span> <span style="background-color: #0072BD; color: white; border: 1px solid #0072BD; padding: 5px 10px; border-radius: 5px; font-weight: bold; margin-right: 10px;">Update</span> <span style="color: red; font-size: 1.5em;">Delete</span> </div> 

View Details
Update
Delete





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# Delete Mandate

## Instructions

**Step 1:** Click the “Mandates” button in the left navigation panel.

**Step 2:** Under list view, scroll to right, and click on “Bin” icon. 1

**Step 3:** Delete Mandate confirmation popup opens.

Click on “Delete” button. 2

**Step 4:** Mandate has been successfully deleted with a toast message at the bottom right. 3

Mandate Health	Upsell Status	Retention Type	Actions
Exceeds Expectations	Ongoing	E	<button>View Details</button> <button>Update</button>  1

### Delete Mandate

Are you sure you want to delete the mandate "Mandate Name Project"?  
This action cannot be undone.

Cancel

Delete 2

### Success

Mandate deleted successfully

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# Update Mandate Checker

## Instructions

**Step 1:** Click the “Mandates” button in the left navigation panel.

**Step 2:** Under list view, scroll to right, and click on “View Details” button. 1

**Step 3:** Select Update Option popup opens.

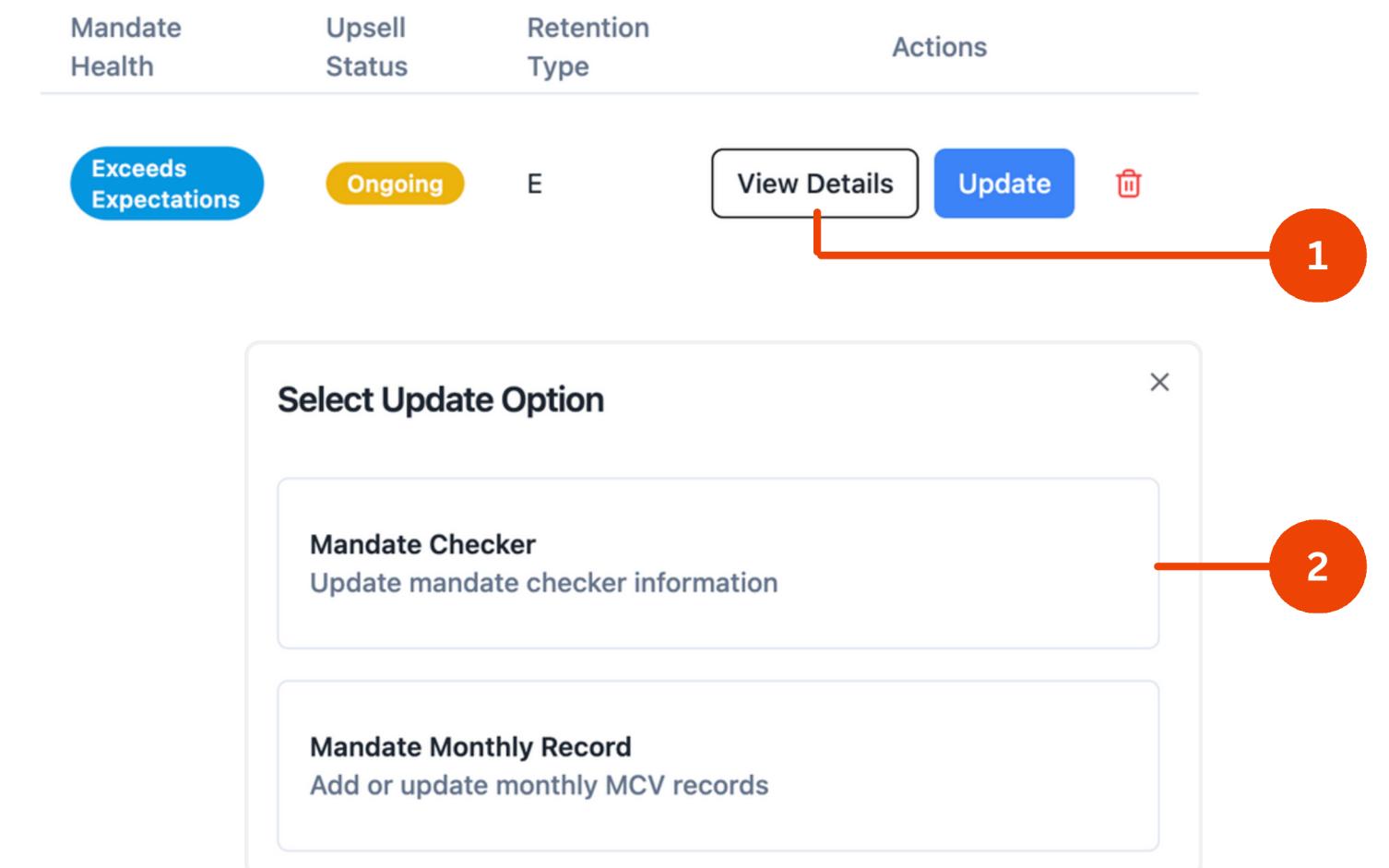
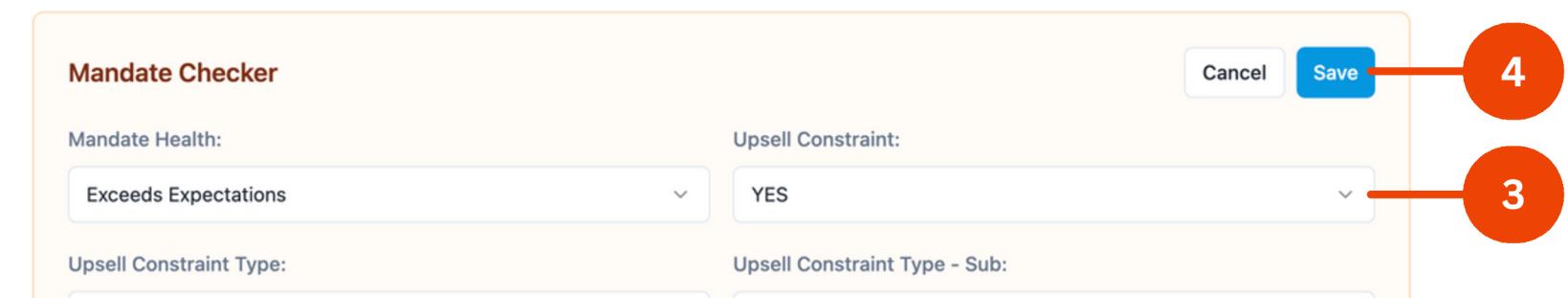
Click the “Mandate Checker” 2

**Step 4:** Mandate details open as popup and, scrolls to Mandate Checker section, with editable fields.

Update the required fields. 3

**Step 5:** Click the “Save” button. 4

Mandate Checker has been successfully updated with a toast message at the bottom right.

**Mandate Checker**

Mandate Health: Exceeds Expectations

Upsell Constraint: YES

Upsell Constraint Type: Internal

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# Update Mandate Monthly Record

## Instructions

**Step 1:** Click the “Mandates” button in the left navigation panel.

**Step 2:** Under list view, scroll to right, and click on “View Details” button. 1

**Step 3:** Select Update Option popup opens.

Click the “Mandate Monthly Record” 2

**Step 3:** Add Monthly Record popup opens.

Update the required fields. 3

**Step 4:** Click the “Save” button. 4

Mandate Monthly Record has been successfully updated with a toast message at the bottom right.

Mandate Health	Upsell Status	Retention Type	Actions
Exceeds Expectations	Ongoing	E	<a href="#">View Details</a> <span style="color: blue; border: 1px solid blue; border-radius: 50%; padding: 2px;">1</span> <a href="#">Update</a> <span style="color: red; border: 1px solid red; border-radius: 50%; padding: 2px;">1</span> <span style="color: red;">Delete</span>

Select Update Option

**Mandate Checker**  
Update mandate checker information

**Mandate Monthly Record**  
Add or update monthly MCV records

2

Add Monthly Record

Month \* 3

Year \*  
2025

Financial Year  
e.g., 2025-26

Achieved MCV \*  
Enter achieved MCV

Cancel 4 Save

4

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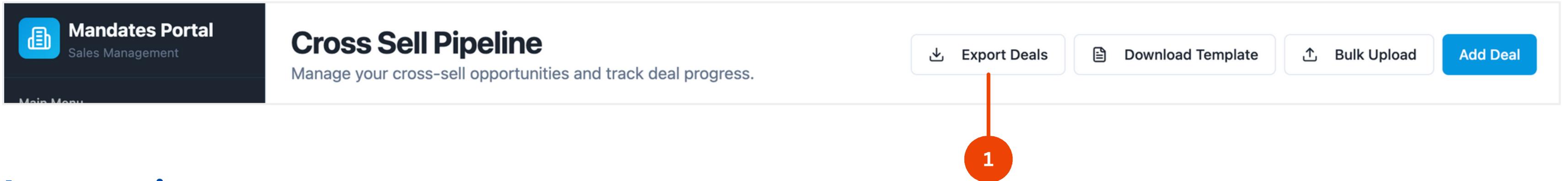
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# Export Deals



## Instructions

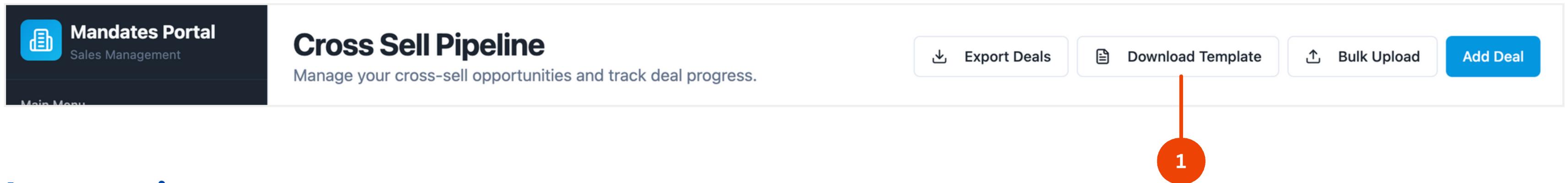
**Step 1:** Click the “Cross-sell Pipeline” button in the left navigation panel.

**Step 2:** Click the “Export Contacts” button. 1

**Step 3:** After clicking, .csv file will be downloaded with the name: **pipeline\_deals\_export\_year/month/date.csv**

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# Download Template



## Instructions

**Step 1:** Click the “Cross-sell Pipeline” button in the left navigation panel.

**Step 2:** Click the “Download Template” button. 1

**Step 3:** After clicking, .csv file will be downloaded with the name: **pipeline\_deals\_upload\_template.csv**

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# Bulk Upload Instructions

**Step 1:** Open the downloaded **pipeline\_deals\_upload\_template.csv**

**Step 2:** Update the data in its respective column. **1**

Do not modify the columns' arrangement.

**Step 3:** Scroll to columns T. **2** Use the reference content to avoid typos and case-sensitive errors. Save the file.

**Step 4:** Open the Mandate portal. Click the “**Cross Sell Pipeline**” button in the left navigation panel.

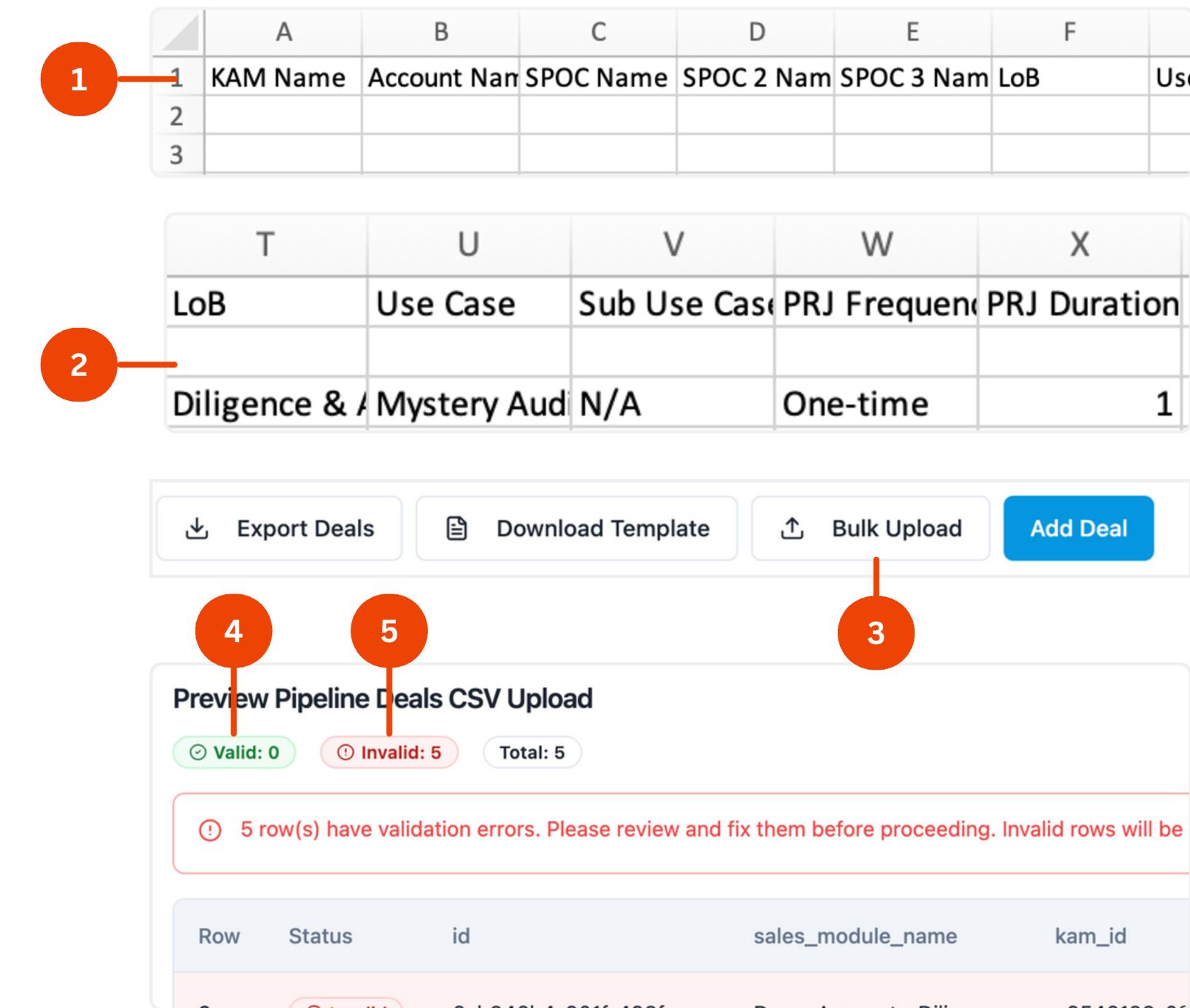
**Step 5:** Click the “**Bulk Upload**” button. **3**

**Step 6:** Browse the .csv file you want to upload from your device.

**Step 6:** Preview Pipeline Deals CSV Upload popup opens.

Make sure all rows are valid **4** with **zero** invalid rows **5**

**Step 7:** When all rows are Valid, “**Upload Entry**” button gets enabled. Click to Upload.



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# Add Deal



## Cross Sell Pipeline

Manage your cross-sell opportunities and track deal progress.

Export Deals

Download Template

Bulk Upload

Add Deal

## Instructions

**Step 1:** Click the “Cross Sell Pipeline” button in the left navigation panel.

**Step 2:** Click the “Add Deal” button. 1

**Step 3:** Add Deal popup opens. Fill all the required input fields 2

**Step 4:** LoB 3 is conditional. It's selection reflects on **Use Case** and **Sub Use Case** field. 4

**Step 4:** Click “Save Deal” Button 3

The screenshot shows the 'Add Deal' modal window. Step 1 is indicated by a red circle with '1' pointing to the 'Add Deal' button. Step 2 is indicated by a red circle with '2' pointing to the 'Sales Module Name' dropdown. Step 3 is indicated by a red circle with '3' pointing to the 'LoB' dropdown, which is set to 'Last Mile Operations'. Step 4 is indicated by a red circle with '4' pointing to the 'Use Case' and 'Sub Use Case' dropdowns, both currently empty. Step 5 is indicated by a red circle with '5' pointing to the 'Save Deal' button at the bottom right of the modal.

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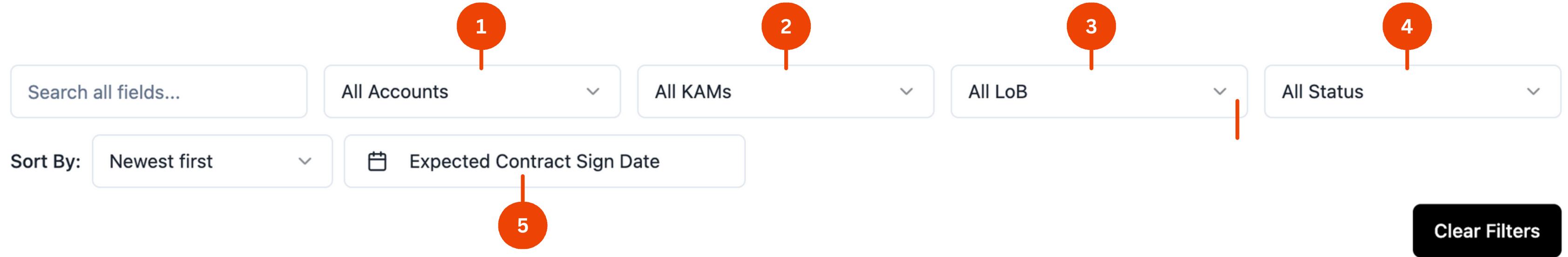
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# Filters



- 1 Based on Account name (Client Name)
- 2 Based on KAM
- 3 Based on LoB
- 4 Based on Status
- 5 Based on Expected Contract Sign Date

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# List view

Sales Module Name	Account	KAM	LoB	Expected Revenue	MCV	Expected Contract Sign Date	Status	Action
Demo Account - Diligence & Audit - Non-Mystery Audit	Demo Account	Vasu 2	Diligence & Audit	₹22,22,222	₹50,00,000	2025-11-24	8. Closed Won	<a href="#">View Details</a> <span>1</span> <a href="#">Update Status</a> <span>2</span> <a href="#"></a> <span>3</span>

- 1 On click, you can view the complete details of the Sales Module.
- 2 On click, the Sales Module can be updated.
- 3 On click, the Sales Module can be deleted.

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# Edit Sale/Deal Module

## Instructions

**Step 1:** Click the “Cross Sell Pipeline” button in the left navigation panel.

**Step 2:** Under list view, scroll to right, and click on “View Details” button. 1

**Step 3:** Details popup opens.  
Click on “Edit” button. 2

**Step 4:** All details turn to editable fields.  
After updating, click “Update Deal”. 3

V	Expected Contract Sign Date	Status	Action
,00,000	2025-11-24	8. Closed Won	<span style="color: green; border-radius: 50%; padding: 2px 5px;">View Details</span> <span style="color: black; border-radius: 50%; padding: 2px 5px;">Update Status</span> <span style="color: red; border-radius: 50%; padding: 2px 5px;">Delete</span>

Demo Account - Diligence & Audit - Non-Mystery Audit

**Deal Information**

Sales Module Name:	KAM:
Demo Account - Diligence & Audit - Non-Mystery Audit	Vasu 2

Closed Won Details

Signed Contract Link \*

Cancel
Update Deal
3

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# Update Status

## Instructions

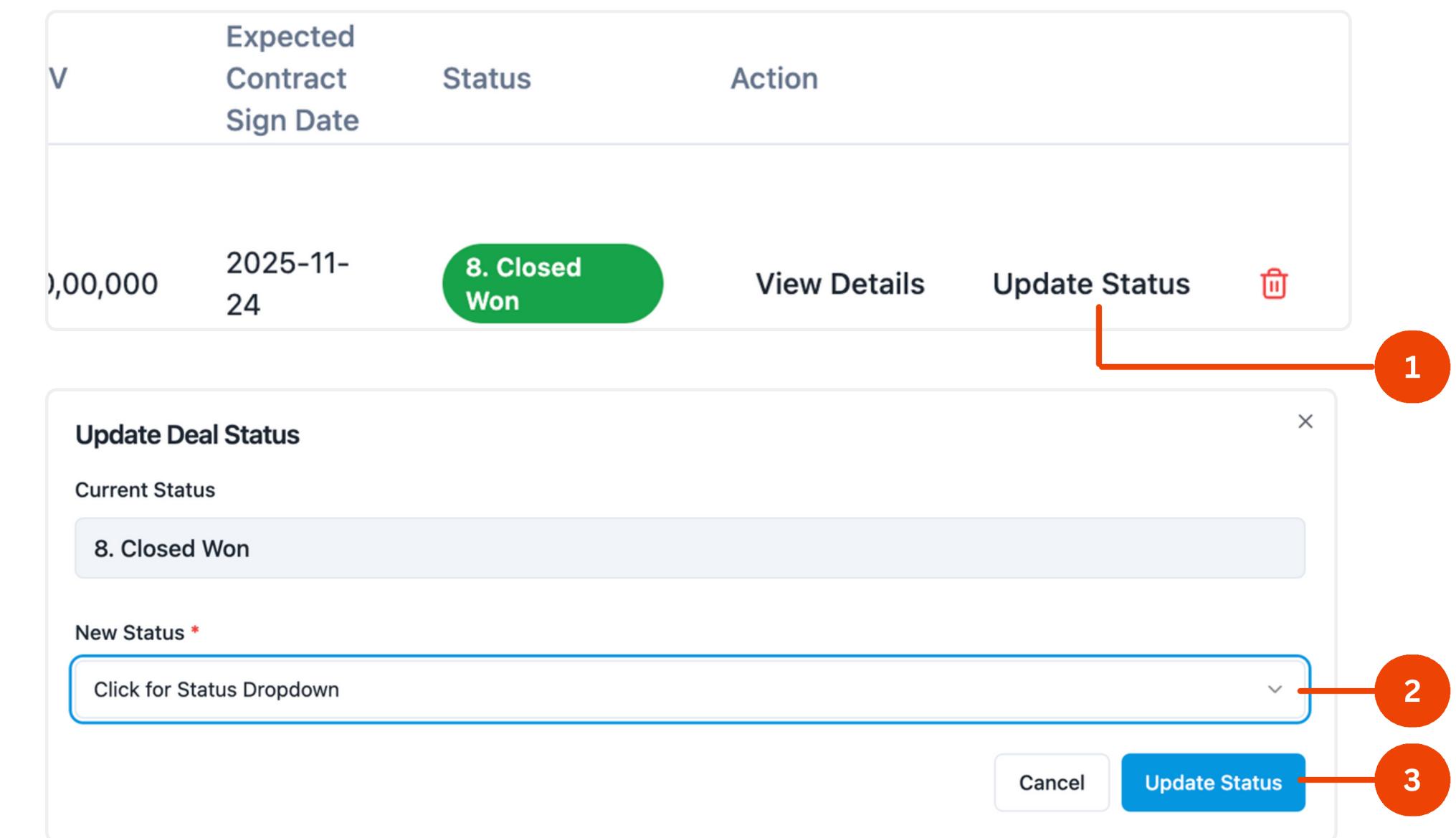
**Step 1:** Click the “Cross Sell Pipeline” button in the left navigation panel.

**Step 2:** Under list view, scroll to right, and click on “Update Status” button. 1

**Step 3:** Update Deal Status popup opens. Update the input field. 2

**Step 4:** After updating, click “Update Status”. 3

Deal Status has been successfully updated with a toast message at the bottom right.



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# Delete Deal

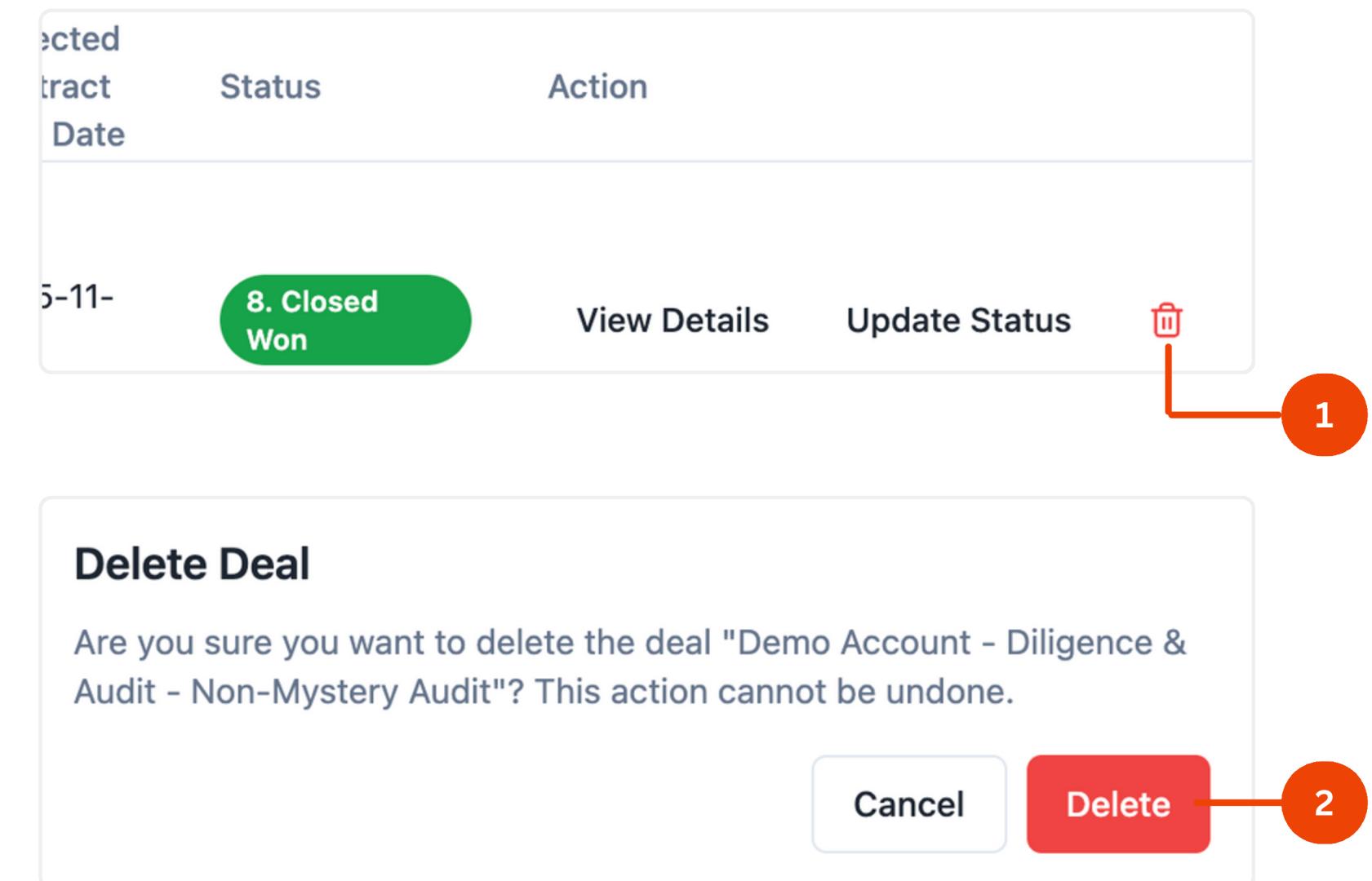
## Instructions

**Step 1:** Click the “Cross Sell Pipeline” button in the left navigation panel.

**Step 2:** Under list view, scroll to right, and click on “Bin” icon. 

**Step 3:** Delete Deal popup opens. Click on “Delete” button. 

The deal has been successfully deleted with a toast message at the bottom right.





## Mandates portal User Guide

**For support contact us**

[support@awign.com](mailto:support@awign.com)

9876543210