

What's New in BlueCamroo?

Version 7.1.4 adds a new way to the create tasks in BlueCamroo, making it even easier and giving you more flexibility. The Sales Dashboard added two new graphs to give you a better idea of how your sales team is performing.

Key:



New Feature



Change to Existing Feature



Setup Instructions

★ Task Creation By Email

You're now able to create a system email address in your workspace which will turn any email it receives into a Task!

BlueCamroo has always aimed to provide a space where work can be done systematically and transparently. One of the features we encourage all our users to take advantage of are Tasks, regardless of how process-oriented their business is. It clearly defines what needs to be done, when, by and for whom. Accountability is built-in, as is time tracking, so you don't have to work more to log your work.

Emails are much less structured. If you have access to a generic email inbox for your company, such as info@ then you know all about the added inefficiency of checking to make sure that email hasn't been replied to yet, or remembering to reply to it, or even returning a call.

Even if you don't struggle with shared email inboxes, you can think of this new feature as a 'ticketing system' apart from the support-oriented Cases.

⚙️ Setup: Task Creation By Email

Only **System Administrators** can create these new system email addresses.

Navigate to **System Setup > Automation > Task Creation By Email** then click on **Add New**.

These are the new fields you need to fill out:

1. **Email** – This is the new system email for your workspace. In the image, we have 'info' and the system address being created is **info@yourworkspace.bluecamroo.com**.
2. **Owner** – This user will be the default Owner of the Task.
3. **Task Subject Prefix** – We'll use the received email's subject line as the Task Subject, but if you'd like to add something to identify it then you can do so.
4. **Priority** – The created Task's default Priority.
5. **Due In** – You can leave this blank if you don't want to set a due date. Set it to 0 days to be due on the same day.
6. **Task Type** – This can be a standard Task or a Call Task, but be aware that phone numbers will not be automatically filled in unless the sender's email address is already in the system with a phone number.
7. **Assign To** – Set this Task to an individual user or a group.

Details

Email

info

Owner

Jack

Task Subject Prefix

[Call Request]

Normal

Due in

1 Days

Task Type

Call

Assign To

Group

Sales Team

🔄 Sales Dashboard Update

Based on our users' feedback, we've added two new graphs in the Sales Dashboard.

Sales Activity by Sales Rep will breakdown the various actions a sales person in the system takes. These include status updates, scheduling events, completing Tasks or logging calls, and of course sending emails.

Sales Pipeline by Sales Rep will list all the Opportunities owned by Sales People and display them in each Phase.

We hope you find these new features helpful. If you have any questions about implementing them, or if you have any suggestions or comments, please send an email to support@bluecamroo.com. We'll be glad to help!

The BlueCamroo Team