

Expense Management Updates & New Bookmarks Feature

This is a maintenance release featuring some highly requested and anticipated features. Get more control over your company's expenses with all new Expense Budgets, and save users time with updates to the Expense Sheet Approval Process letting you approve or reject expense sheet items on an item-by-item basis. We've also added a brand new Bookmark feature letting you quickly navigate to frequently visited pages and records within BlueCamroo.

Key



New Feature



Change to Existing Feature




Setup Instructions

Expense Policies and Enhanced Expense Sheet Approval Process

Tracking expenses is not the most fun job in the office, but an argument can easily be made that it is one of the most important ones. With the new Expense Policies feature, you'll be able to set Expense Budgets for individual Users or for Groups. You can create multiple budgets, for

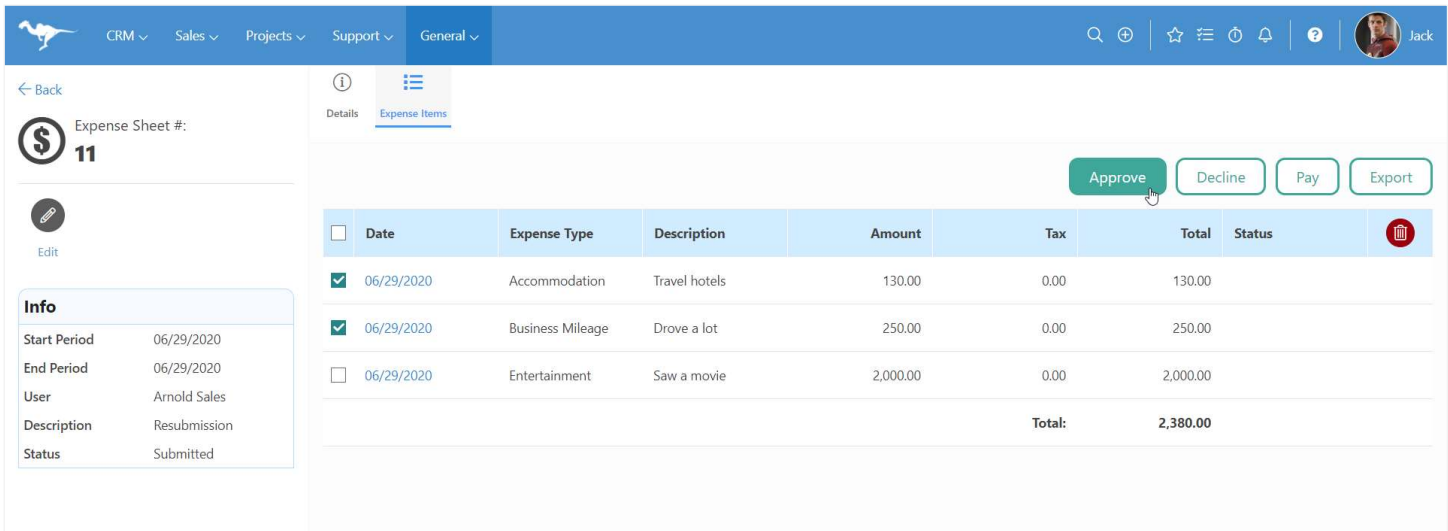
Expense Budgets

Period	Budget	
Monthly	3000 USD	

example: For a group you can give each user a maximum of \$1,000 / month, but then also limit them to a maximum of \$5,000 / year to make sure they don't just try to max out their monthly budget every month. You can set budget time periods daily, weekly, monthly, quarterly or annually.

To set up navigate to **Setup > Financial Setup > Expense Policies**

Another update to BlueCamroo can be found in the Expense Sheet Approval process. Once Expense sheets are submitted the user in charge of reviewing them can now decide on an item-by-item basis instead of just approving or rejecting the entire Expense Sheet. Save your users the time they may have to spend from having to resubmit expense sheets that have been rejected because one or a few items that aren't covered by your business or have been entered incorrectly. Expense Sheet Approvers will now also be able to browse through individual users' Expense Sheet history.




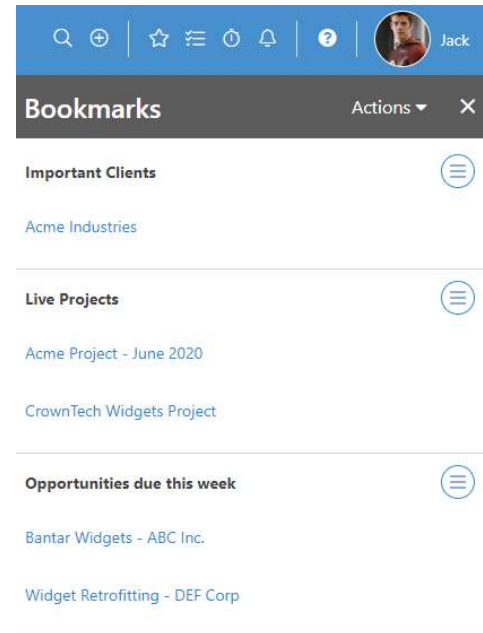
The screenshot shows the BlueCamroo interface for reviewing an expense sheet. The top navigation bar includes CRM, Sales, Projects, Support, and General. The main content area displays an expense sheet with a table of items. The 'Approve' button is highlighted with a mouse cursor.

Date	Expense Type	Description	Amount	Tax	Total	Status
<input checked="" type="checkbox"/> 06/29/2020	Accommodation	Travel hotels	130.00	0.00	130.00	
<input checked="" type="checkbox"/> 06/29/2020	Business Mileage	Drove a lot	250.00	0.00	250.00	
<input type="checkbox"/> 06/29/2020	Entertainment	Saw a movie	2,000.00	0.00	2,000.00	
Total:					2,380.00	

★ Bookmarks

Do you ever find yourself dealing with parts of BlueCamroo more often than the rest? Whether it's a Customer, a Project, the hosting information of a Website in the Web Development Platform, a Dynamic List for Email Marketing, or anything you visit regularly, you can now bookmark any page in the front end of BlueCamroo so you can navigate to them quickly.

To bookmark a Page you first need to create a folder, click on the Star Icon in the Top Bar . Then open the Actions drop down and select **Create Folder**. Give your folder a name and click **Save**. Now navigate to the page you want to bookmark and click on the Star Icon again, open the Actions drop down and now select **Bookmark This Page**, add a name and select the folder you want to save it into. You can Edit or Delete bookmarks or folders. Note that if you delete a folder you will delete any bookmarks inside.



We hope you enjoy BlueCamroo 8.0.5, if you have any questions about this release, 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