What's New in BlueCamroo?

This Version 7.1.4 is a maintenance release, we have made small updates throughout the backend of BlueCamroo that will mostly go unnoticed but will help BlueCamroo to run smoother and to improve security.

We have made a couple of notable adjustments in Calendar Events. Users will now be able to take attendance and easily send follow up notes with attachments, as well as a reorganization of how event details are laid out.

Key:

⭐ *New Feature*   🔄 *Change to Existing Feature*

⚙️ *Setup Instructions*

🔄 Meeting Attendance

It's long been said that 80% of success is showing up. This is why meetings are an important part of any workplace, whether you're making decisions about projects, meeting with prospective clients or hosting an event. BlueCamroo already gives you the ability to send invitations to anyone in the CRM as well as fellow Users, but now you can take attendance of who actually showed up.

In the Meeting Details you will see a new column in the Invitee List. You can check off who attended the meeting.

Once the event has passed you'll also be able to send out Follow Up Notes to those who attended, those who were absent, or to everybody who was invited.

🔄 Follow Up Notes

If 80% of success is showing up then the other 20% is following up.

After a meeting there are a few crucial moments when all of the information absorbed is still fresh, people are ready to take actions but that mindset can quickly dissipate.
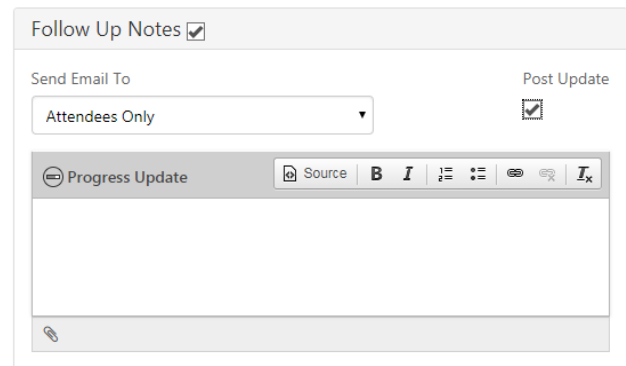
The ability to send Follow Up Notes will allow users to reinforce the information that was discussed at the meeting and any instructions that are needed.

To send follow up notes check the box at the bottom of the left section in the Event Details:

You'll have the option to send the notes to those who attended, those who were absent, or to everybody who was invited. You can include attachments in the Follow Up.

You can also post your Follow Up Notes to the Update Stream of whichever record is connected to the Event.

The Notes will be sent via email.

⚙️ Setup: Follow Up Notes

The Follow Up actions uses a new Email Template called "Event Follow Up Notification".

Administrators can find and edit the template under:
Setup > System Setup > Automation > Email Templates.

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