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Box Connectivity

Note: BlueCamroo Box connectivity is fully supported in up-to-date versions of the four major browsers. Internet Explorer Version 9 lacks support for file upload to Box from BlueCamroo. IE9 users that require Box connectivity should upgrade, or use a different browser while working in BlueCamroo.

Note: This User Guide assumes that your company has set up a Box account with at least one user login. The guide will show you how to configure BlueCamroo to access Box files via your BlueCamroo Library page and from all main objects such as organizations, projects, cases, etc.

Setting Up Access

BlueCamroo Box connectivity can be configured in three ways:

1. **Individual Access - My Login (Standard Setup)**

Each user of your BlueCamroo workspace connects to the Company Box Account using his or her individual Box User Name and password. Box will see all file additions / updates made via BlueCamroo as having been made by the relevant user. (Have every user setup 'My Login'. Do not setup 'Shared Login'.)

2. **Shared Access – Shared Login**

All users of your BlueCamroo workspace access files in the Company Box account using the same Box User Name and password. Box will see all file additions / updates as having been made by the same user. (Only setup the 'Shared Login' option.

3. **Mixed Access**

Some users(those who don't have a user login) connect via a Shared Access, while others use their own Individual access. Box will see file additions / updates by those with logins as being made by that user, and file additions / updates of those without logins as being made by the same user. (Have users with their own logins setup 'My Login', but also setup 'Shared Login' for those without their own login.)

Individual Access

The following steps will configure connection to Box if each user who will be accessing Box from BlueCamroo has their own unique login to your Company Box account.

Instruct each user to follow these steps to setup their own connection.

- 1) Each user accesses **Setup > Integrations > Dashboard** and in the online file sharing section, click on the **Box** logo.
- 2) Mouse over **Add New** on the actions bar.
- 3) Click **My Login**.
- 4) Fill in your login details, then click **Authorize**.
- 5) After authorization, BlueCamroo will add a **Box** option to the **Library** area on every users **Main Navigation Panel**.
- 6) All users can now access your Box files directly from **Library > Box**, and also within the **Attachments** option of individual data records.

Note: Users that have their individual access to Box configured automatically have the ability to share links to files in Box via the BlueCamroo interface. There is no separate step to enable link sharing.

Shared Access

The following steps will configure connection to Box if you have a Box account that is only configured for one user. This gives access to your Box account to every one of your BlueCamroo users using the same login.

- 1) Have an administrator access **Setup > Integrations > Dashboard** and under the online file sharing section, click on the Box logo. Mouse over **Add New** on the actions bar.
- 2) Click **Shared Login**.
- 3) Fill in the login details, then click **Authorize**.
- 4) By default, if using this setting, link sharing is disabled. If you wish to enable link sharing via BlueCamroo, click on the Shared Login account you have set up in BlueCamroo, then on your actions bar, click **edit**. Check the **Allow Create Share** option.
- 5) After authorization, BlueCamroo will add a **Box** option to the **Library** area on every users **Main Navigation Panel**.
- 6) All users can now access your Box files directly from **Library > Box**, and also within the **Attachments** option of individual data records.

Shared *and* Individual Access

If you configure Shared Access AND some or all users create their own Individual Access, BlueCamroo will always choose to connect users via their Individual Access. Therefore, it is possible for some users to have their own Individual Access configured, while Shared Access is also configured to support all other users of the BlueCamroo workspace who do not have their own Box login.

What you can do

- 1) **Access your Box.com account from within BlueCamroo allowing you to:**
 - Upload Files
 - Organize Files by creating folders
 - Copy or Move Files
 - Share Files with other users

Using Box with BlueCamroo

You can access and integrate your Box files in several places in BlueCamroo.

Box Page

When Box is enabled, users will see an additional option in the Library section of the BlueCamroo **Main Navigation Panel**. In this example, Box.com has also been added. Clicking on the link brings up the Box page.

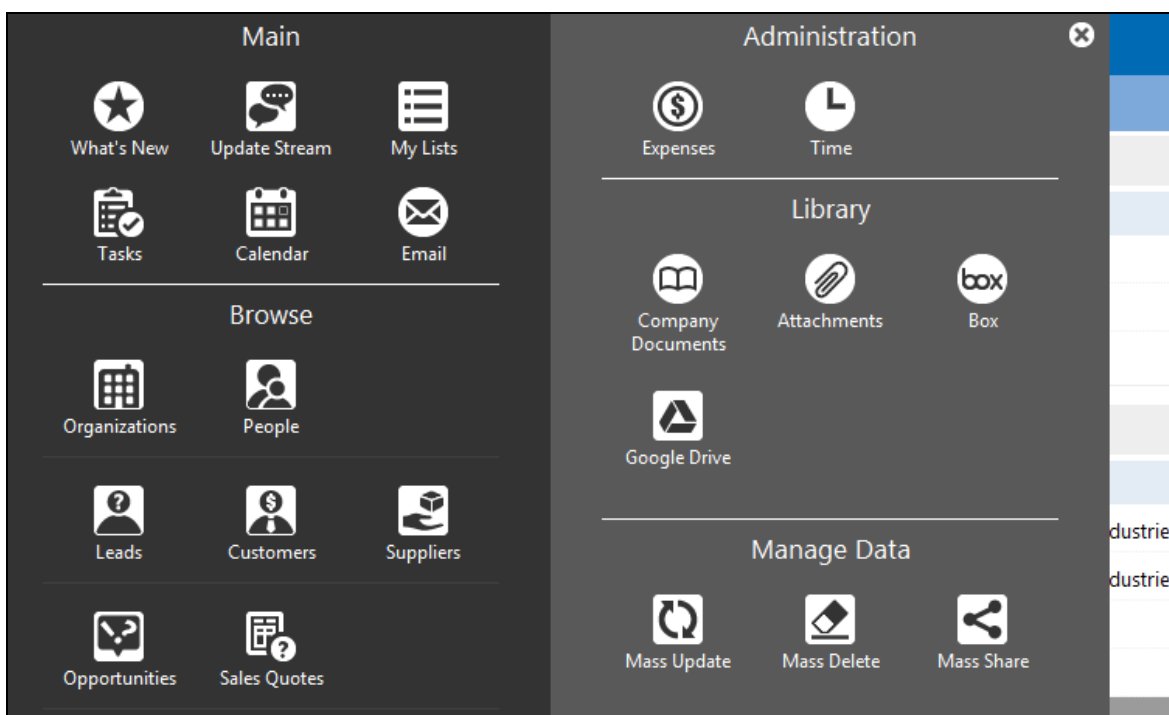


Figure 1 - BlueCamroo Main Navigation with Box.com and Google Drive Enabled

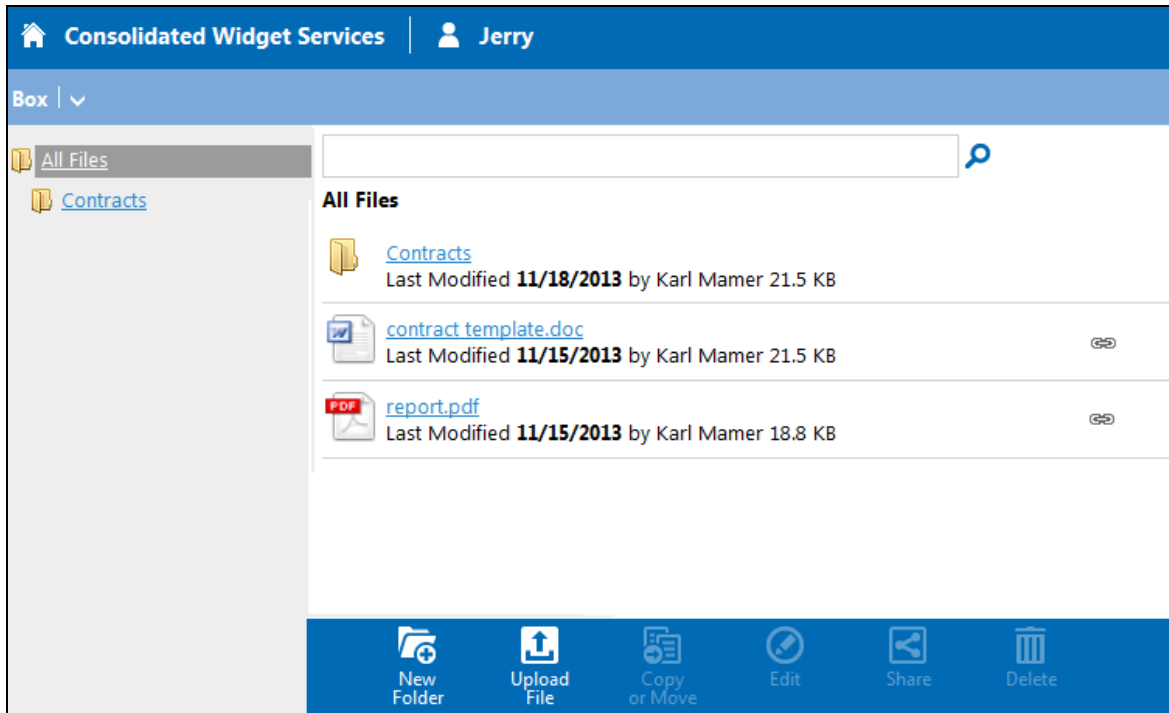


Figure 2 - Box Files viewed from Library section of BlueCamroo

From BlueCamroo, users can perform the following options using the bottom **Actions Bar**:

Option	Description
New Folder	Create a new folder in your Box account
Upload file	Upload a file to your Box account.
Copy or Move	Copy the file or move it to another folder. Select the file to copy or move from the dialog Box, click on the folder you wish to copy or move the file to, and click either Copy or Move on the dialog Box.
Edit	Edit the file name.
Share	Click if you want to immediately share the selected file via a BlueCamroo email. Files shared will be noted with a small link icon. Sharing must be activated under Setup > Integrations > Online File Sharing .
Delete	Delete the file from Box.

Attach from Box

When BlueCamroo provides an **Add Attachment** option, you can access and attach your Box files via the **Lookup** button.

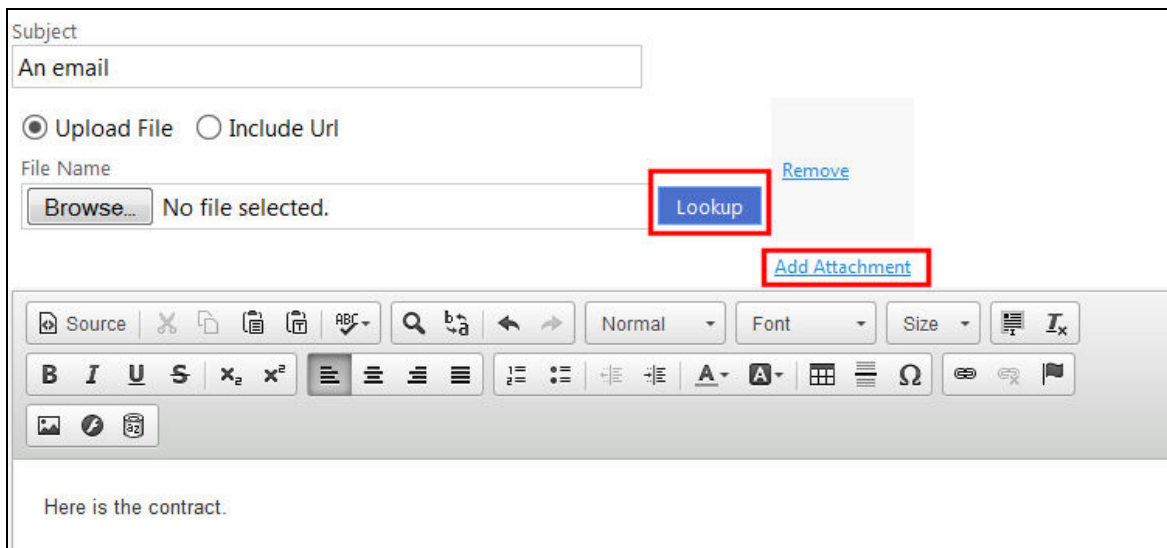


Figure 3 - Attaching from Box in BlueCamroo (Step 1)

After clicking the **Lookup** button, click the **From Box** tab on the **Lookup** dialog and click the document to attach.

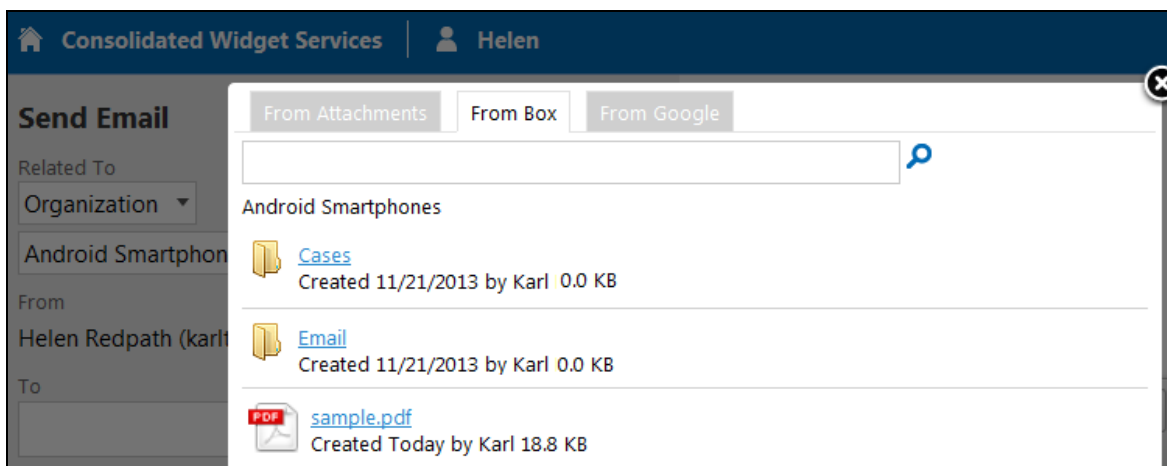


Figure 4 - Attaching from Box in BlueCamroo (Step 2)

Access Box Files and Folders for a Record

The first time you access a record's **Attachments** section, BlueCamroo will create a folder tree on Box representing the record and sub-records that support their own attachments. For example, if you access the organization Paragon Mines and click the **Attachments** option, BlueCamroo will create an Organizations folder on Box (or use any existing folder named Organizations) and insert a sub-folder called Paragon Mines. It will also create sub-folders below Paragon Mines for Cases, Emails, Opportunities, Projects, and Tasks (all sub-records to which you can attach a file).

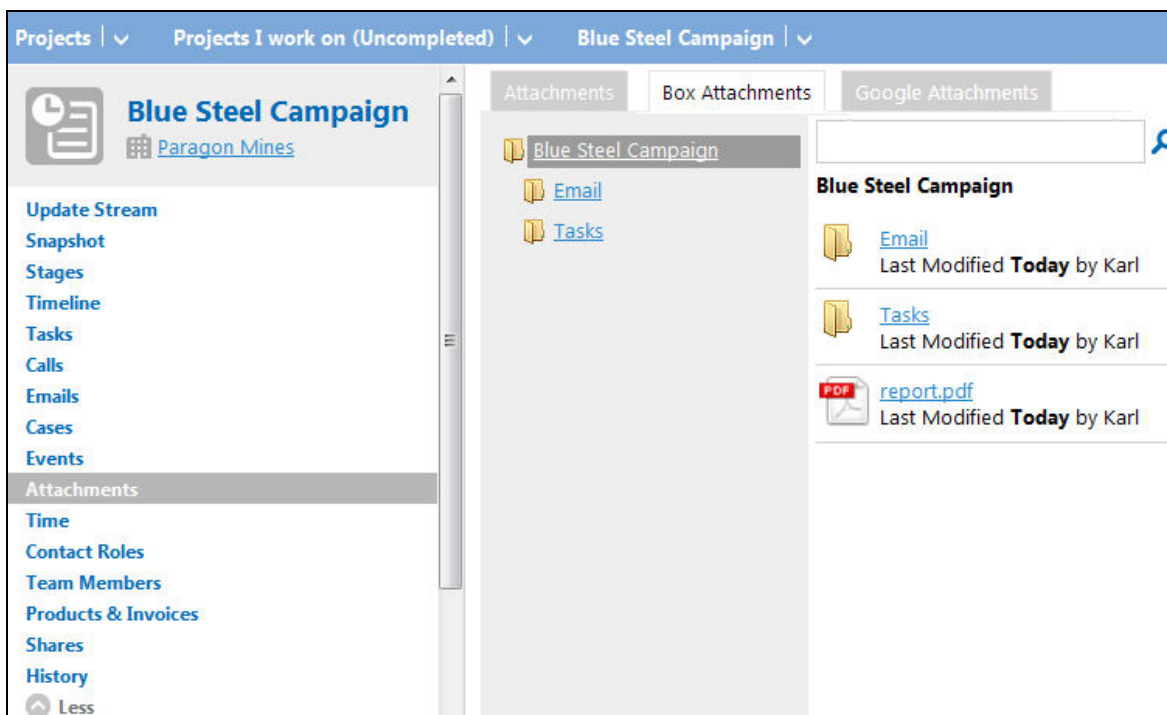


Figure 5 - Project Files for Paragon Mines' Blue Steel Campaign

BlueCamroo will only display the appropriate "root", depending where you are. For example, a project is a sub-record (and sub-folder on Box) of an organization. If you open an organization record's project and click **Attachments**, BlueCamroo will use the project as the root.

Figure 7 shows the same folder viewed from the main Box page.

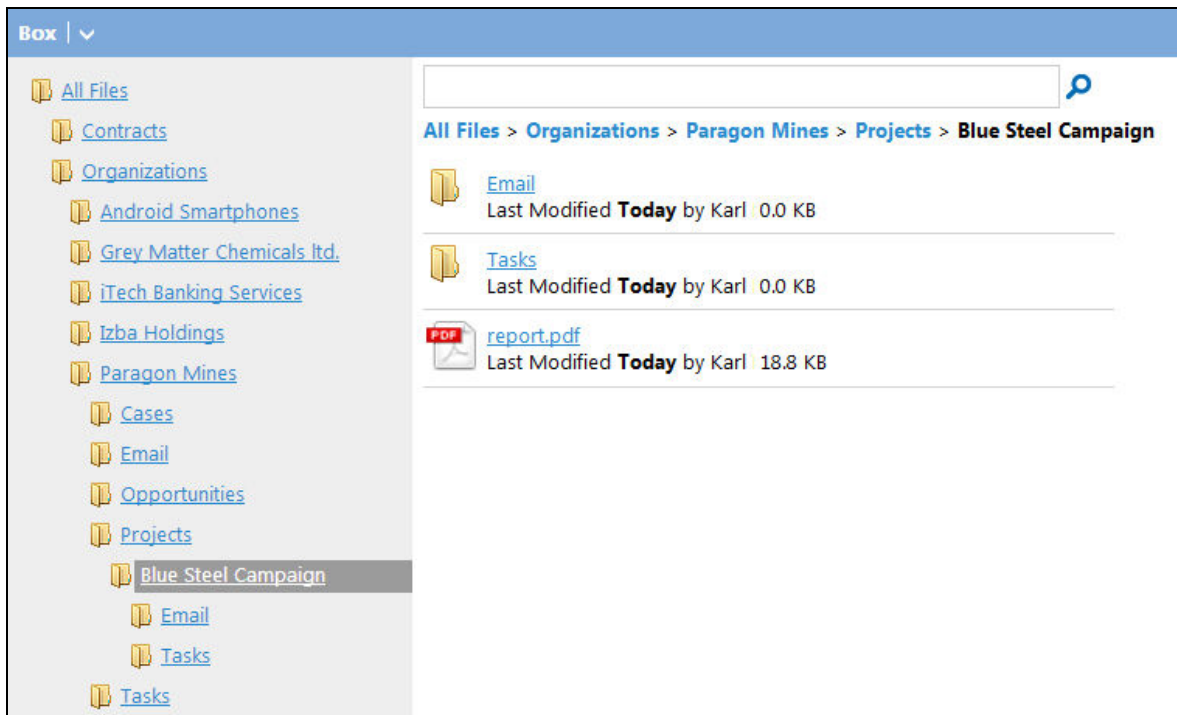


Figure 6 - Project Files for Paragon Mines' Blue Steel Campaign



Do More with BlueCamroo