Control
sales pipeline

Manage
tasks & projects

Support
your clients

Get Social
with Social Scout

Collaborate
with your team

Customize
and make it your own

Automate
with Workflow Rules

Accelerate
your business

Smarter CRM - Architected for the 21st Century

blue camroo

Why BlueCamroo?

Get the tools you need to collaborate effectively in your office and with your clients.

- Capture every lead
- Build and control sales pipeline
- Nurture every prospect
- Deliver and track Email campaigns
- Close more deals
- Manage projects and tasks
- Collaborate across your team
- Manage pricing and options
- Track time and expenses
- Invoice and get paid
- Automate workflow and tasks
- Exploit social networks
- Resolve issues with support tickets
- Customize and configure
- Access anytime, anywhere

What is BlueCamroo?

BlueCamroo helps small- and medium-sized businesses do more with less. It's a complete, integrated and affordable web-based application that helps you track and manage your sales leads, customers, contacts, opportunities and projects.

It's a collaboration platform that keeps your team in the loop and communicating.

It's a support ticketing system that helps you deliver great customer service.

It's social network monitoring that finds sales opportunities and spots service issues across Twitter, LinkedIn and Facebook.

It's time tracking, expenses management, invoicing, online payments, and invoice reminders that keep your cash flowing.

It's automated processes that run 24/7 to capture leads, chase up tasks, respond to customers and manage billing — making BlueCamroo the hardest-working member of your team!

BlueCamroo is great value too! With CRM, Project Management, Social Network Monitoring, Email Marketing, Calendars, Time Tracking, Invoicing, Support Ticketing, Task Management, Expenses Management, Collaboration, Automation and more, you really can ***Do more with BlueCamroo!***

Who is BlueCamroo for?

Marketing Agencies, Wedding Planners, Lawyers, Web Developers, Consultants, Videographers, Telemarketers, Engineers, Daily Deal Websites, Interior Designers, Virtual Assistants, Solar Installers and more feel at home using BlueCamroo today. BlueCamroo works for all kinds of businesses that need to keep on top of their sales, their customer data, and their project delivery.

BlueCamroo is trusted around the world by users on every continent, from sole traders and micro-businesses to mid-sized firms and even work-groups inside major corporations that need flexible alternatives to their own rigid in-house systems.

All users benefit from the same great set of features, with no minimum contracts; no lock-in and no need to upgrade to more expensive plans to access additional tools or integration options.

BlueCamroo is a pure online, cloud-based service, accessed with just a web browser. There's no hardware investment, and no installation required. Just click, and start working smarter with colleagues, customers and suppliers wherever they're located.

Is BlueCamroo for me?

Do you have a CRM system and a Project Management system that don't share data?

Are you tired of paying over the top for separate systems that each provide a small part of the tools you need?

...then BlueCamroo may be for you!

Check the statements below. If more than a few are true for your business, you're likely to benefit from BlueCamroo:

- ☐ My business mainly provides services
- ☐ We have project processes that we repeat for many customers
- ☐ I or my team need to access information from multiple locations
- ☐ It's important to co-ordinate everyone's tasks, and keep on top of progress
- ☐ It's important we respond to client issues in an organized way
- ☐ We bill clients for the time we spend (or track time for our own purposes)
- ☐ I want to keep track of what customers are saying on Twitter
- ☐ We'd like to make it easy for clients to pay us online
- ☐ We need to capture sales leads coming from our website and respond promptly
- ☐ We send (or we'd like to send) regular email newsletters to our customers and prospects

Of course, the best way to decide if BlueCamroo is right for you is to try it out — which is why we offer a free personal online demo and 14-Day free trial workspace, with no restrictions and no obligation.

Capture Every Lead

Sales are the life-blood of every business, so making it easy to get leads into your CRM system and respond effectively is vital. BlueCamroo offers multiple ways to capture leads: from your website; from email inquiries; and directly from social media sources such as Twitter and Facebook. You can also import leads from other sources, and even integrate third-party lead-generation systems using the BlueCamroo API. Wherever your leads come in from, BlueCamroo's workflow rules can help you respond by assigning tasks to your sales team, and through email auto-responders and drip email follow-ups.

Web-to-Lead & Web-to-Opportunity

BlueCamroo enables you to create unlimited Web-to-Lead and Web-to-Opportunity forms to place on your website, blogs, and any other online properties. When a visitor completes your web form, their details are automatically entered into BlueCamroo as a lead or as an opportunity.

Email-to-Lead

If your business uses a general sales email – "sales@yourco.com", or similar – then it's probably someone's job to take details of everyone who inquires and add them to your prospects database. With BlueCamroo, that's one job you don't need to do: simply point your 'sales@' address to your BlueCamroo workspace and all new inquirers will be added automatically.

Import & API

Data from other systems, and from lists you may have purchased, can be added to BlueCamroo by importing from a CSV, Excel or Access file. Alternatively, if you have other lead generation systems running, the BlueCamroo API provides a means of adding new leads automatically to the BlueCamroo database.

Social Network Searches

BlueCamroo's Social Scout feature allows you to search Twitter and public Facebook updates for messages that include your choice of keywords together with 'buying signals' such as "I need", "can anyone recommend", or "what's the best" to find people actively looking for your product or service. And when you've found them, all it takes is a couple of clicks to add them to your leads for follow-up.

Automated Follow-Up

Every new inquiry deserves a fast follow-up. However you get leads into the system, BlueCamroo's configurable Workflow Rules let you define and automate triggered actions that run whenever a new lead is added, for example assigning a task to a sales person, or sending an acknowledgement email to the lead and setting their expectation for when you will contact them.

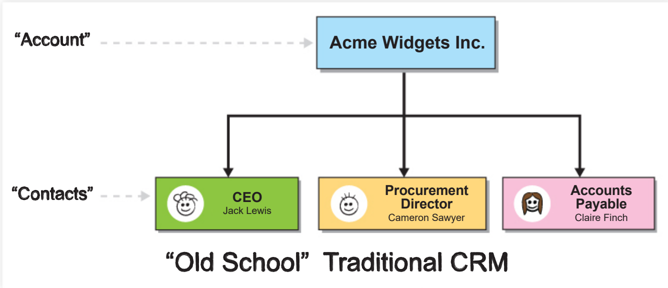
And by using BlueCamroo's built-in email marketing engine, you can even subscribe leads to a drip email follow-up campaign, sending a series of scheduled follow-ups at pre-defined intervals.

Leads are precious. BlueCamroo helps make sure every lead is followed-up, so opportunity doesn't slip through your fingers!

If you've worked with a CRM system in the past, you've probably got used to having your data organized something like this chart:

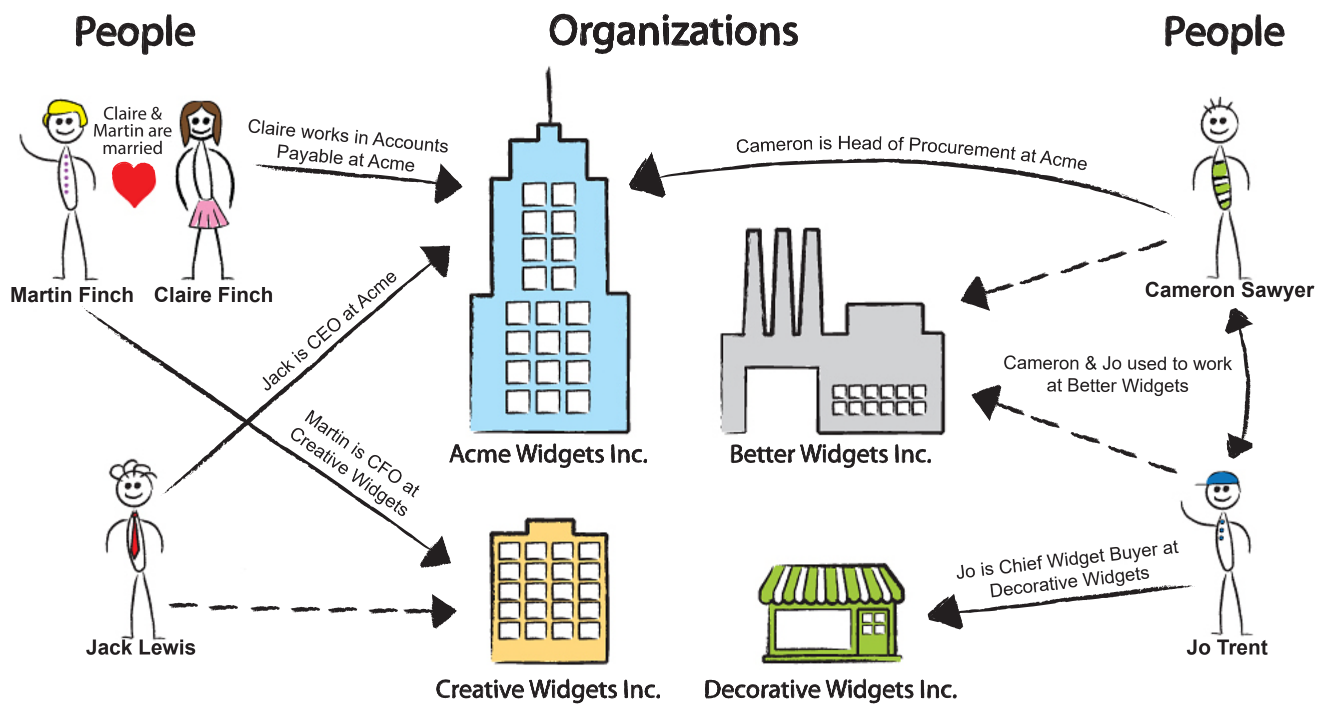
This is great, at least until one of your contacts leaves the 'Account' they're connected to and moves to a different company, or even starts working at two Accounts at the same time. And what about the customer who doesn't have a company to 'belong' to because he or she is just an individual consumer?

The workplace is becoming more flexible. People's work relationships are no longer simple, and the simple structures of traditional CRM systems can't keep up with the way we work today.



BlueCamroo's patent-pending CRM approach and architecture is built for the real world in the 21st Century - a world where people move from job to job, or freelance with several organizations at the same time, or sometimes buy from you on their own behalf - not on behalf of a company.

In BlueCamroo you're not tied to 'Account' and 'Contacts'. Instead, you work with People and "Organizations", like this:



21st Century CRM

If you have a professional sales team, you probably hired them at least in part for their relationships and networks – because they understand who knows whom in your industry, where they came from, and whom they influence.

So why give them a CRM system that makes it impossible to record the history of a sales contact over multiple employments, or track key relationships between actual and prospective customers?

Simply, by mirroring the real world, BlueCamroo provides Smarter CRM, that you and your team can use to share information about key contacts as they really are, not confined to a narrow concept of Accounts and Contacts that stopped making sense last century.

Customer. Supplier. Both. Neither.

In BlueCamroo, Organizations and People can be Customers or Suppliers. Or both. (Or neither!) A person can work for one of your suppliers, and also be a personal customer. A freelancer might work for two or three of your customers, and maybe even work for you as well.

BlueCamroo enables you to reflect all these roles and relationships, and properly associate your interactions with each person to the correct context — so information is visible for all a person's roles, but never confused.

We live in the 21st Century. Your CRM should too!

Build & Control Sales Pipeline

*'A salesman may only be as good as his last month's figures, but a business is only as secure as its **future** sales pipeline.'*

One of the most important features of any CRM system is to help management measure sales pipeline. This means having a system of recording, tracking and reporting on sales opportunities that reflects your sales process, and your experience of sales conversion.

Managing Sales Opportunities

A Sales Opportunity in BlueCamroo is a specific, identified piece of business that you and your sales team is working to secure. Sales opportunities can be with leads or existing customers, and every sales opportunity records the following information:

- Projected value of the business if it is won
- Projected closing date
- Estimated probability (percentage chance) of winning the sale

This lets BlueCamroo calculate a total estimated Sales Pipeline value, so you can be sure your business is remaining healthy.

Configurable Sales Stages

Every business has its unique sales process, with specific phases and steps, and with its own experience of how many opportunities at each step of the sales funnel are likely to convert to business.

BlueCamroo enables you to easily configure your own sales process steps, with your own default probabilities of sale at each stage. This means you can fit BlueCamroo to your sales process; not the other way around.

Multiple Sales Quotes

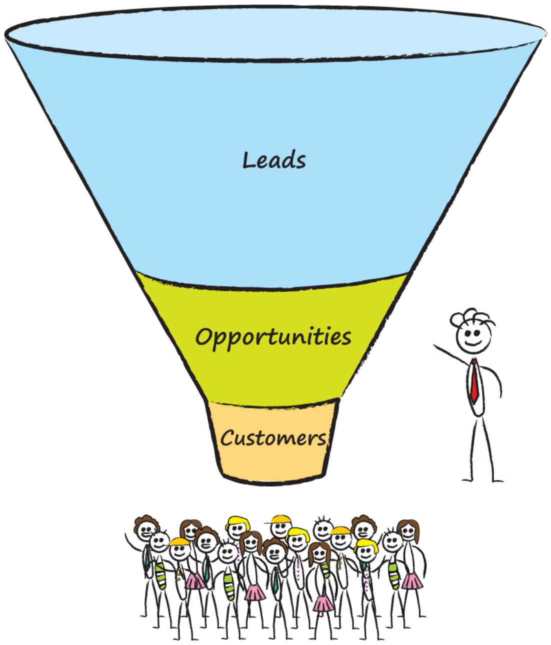
It's no secret that most salespeople don't much like doing admin.

A CRM system that requires them to add information about sales pipeline just so management can report on it is unlikely to be well maintained. If it's to be used, the system has to do something for them!

BlueCamroo helps save time in the sales process – and ensures that Opportunities are entered in the system – by enabling multiple Sales Quotes to be created and emailed directly from an Opportunity. (The system will even update the Sales Stage to 'quoted' automatically when the quote is sent!). This is a benefit to the salesperson, and to your business as a whole.

Sales quoting in BlueCamroo is very powerful, and very flexible:

- Fully configurable Sales Quote Template for your own layout and branding
- Detailed line-items and comments
- Accurate pricing through full product / service price grids and customer-specific Price Books and Sales Tax Calculated
- Attach files – e.g. Specification or Terms & Conditions
- Quote may be accepted online or by email up to the 'Valid to' date
- Accepted Quotes automatically update the Opportunity status



Multiple Cost Estimates

Estimate is the estimated internal cost for the proposed opportunity (Products, Supplies, Time etc).

Each Sales Quote or Opportunity will have a unique estimate to satisfy different requirements.

Report Sales Pipeline

BlueCamroo enables you to create reports from all areas of the system, so you can drill into any area of your Sales Pipeline that you wish.

For an overview, however, BlueCamroo provides a pre-defined Sales Pipeline Report that you can run for any period to see:

- Number, value and probability-weighted value of Opportunities at each stage of the Pipeline at the start of the period, added during the period, and at the end of the period
- Number and value of Opportunities won and lost in the period
- Additional sales in the period (i.e. orders that came without being first identified as an Opportunity)
- Total sales in the period

Direct Conversion into Projects

A high-value Sales Opportunity is likely to have a fair amount of notes, discussions, emails and other history attached to it before the sale is closed. BlueCamroo lets you convert Sales Opportunities directly into Projects, retaining all the history, quotation information, and other settings necessary to ensure your Projects team have all the information they require, right from the start. An associated cost estimate will automatically be converted into the project budget.

After all – your Project guys probably like re-keying data as much as your sales team!

OK – so you've captured a Lead from your website, developed the Opportunity, and closed the sale. Congratulations! Now BlueCamroo can help you deliver...

Schedule Project Stages & Tasks

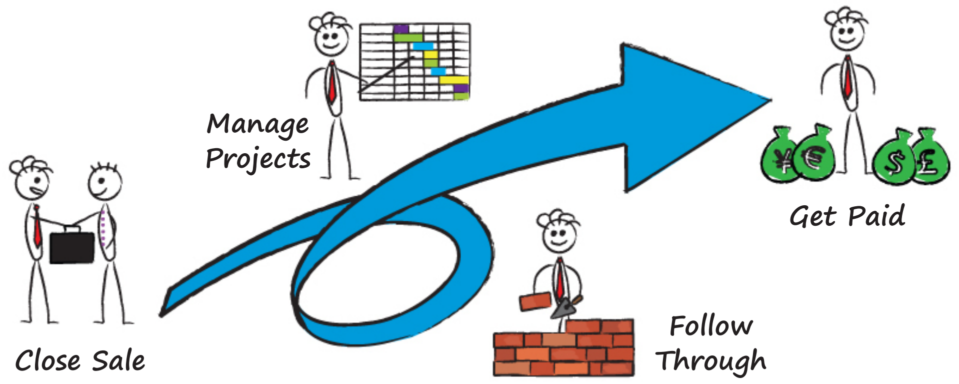
BlueCamroo's Project Management tools enable you to:

- Define the Stages and Milestones of your Project, and how each stage depends upon the stages before it
- Define the Tasks that make up each Stage, and their dependencies
- Enable Workspace Collaboration Bridge which allows occupancies using Bluecamroo to manage and share resources or projects
- Define the project team, and assign the project tasks to the appropriate team members
- Even include resources from other BlueCamroo workspaces using an industry first Workspace Collaboration Bridge
- Set rules for which stages require client sign-off, and when any interim billing should take place

Track & Report Project Progress

Project Tasks are distributed to each team-member's task inbox, allowing progress to be tracked as team members update and complete their tasks. A Gantt-style Project Timeline gives a visual overview of progress while BlueCamroo's unique Visual Workbench helps Project Managers visualize and respond to schedule change.

The Project Team can easily collaborate using BlueCamroo's patent-pending Project Update Stream, allowing everyone on the project full visibility of progress and priorities. And like every area of BlueCamroo, reports can be created to report on the status of Projects, their Stages and Tasks.



Track Actual Cost vs Budgeted

Project budget tracking will let you see actual cost in relation to the budgeted costs.

Manage Project Amendments

Respond to Client change requests with a dedicated approvals workflow to gain approval for project costs and schedule changes.

Balance Resources

When everyone is busy on multiple projects, BlueCamroo's Resource Management views let you find capacity to deliver priority tasks, and provide the big picture view of where team members are over-assigned or will become available.

Manage Sign-offs

Getting client sign-offs is a key discipline in effective project management. BlueCamroo automates the process of requesting and recording sign-offs. Sign-off requests are generated directly from the project and emailed to the customer. Customer sign-off is captured and recorded to the Project, giving you the evidence you require if there should ever be a dispute.

Share with Customers & Suppliers

BlueCamroo is not just for your internal project team. You can invite Customers and Suppliers to share project information with you via BlueCamroo's External User Portal, include them in updates, and assign them tasks. And what's more, External User Portal access is FREE with your BlueCamroo workspace.

Invoice & Get Paid

BlueCamroo's invoicing processes run directly from the Project. The invoice format is fully customizable to your layout and branding, and is sent directly from BlueCamroo. If you use a supported Payment Processor, you can even use BlueCamroo to enable your client to pay your invoice online, making a seamless, closed-loop process from Lead to Opportunity to Sales Quote, through Project Management and Invoicing into Payment.

Online payments update the Project, and automatically mark the invoice 'Paid'.

Automate & Re-Use

If many of your projects follow a similar pattern, defining a Project Template and Stage Template with smart Workflow Rules can save time and ensure quality and consistency. Stages and Tasks with their dependecies, Project Roles, Sign-off requirements and stage billing rules can all be included in the definition of a project template, allowing each new project to be created in a snap.

BlueCamroo lets you spend more time managing the actual projects, less time managing the Project Management system.

Support Clients

Whether it's a complaint or just a simple request for assistance, customer service issues need to be captured, tracked and resolved quickly. Many companies find that a customer who has complained and had their complaint resolved quickly and well will become even more of a loyal advocate than a customer who's never experienced a problem in the first place. Customers whose issues are not resolved, however, have greater potential than ever to turn into 'noisy detractors', using social media to publicize their complaint far and wide. More than ever, this means that Customer Service needs to be integral to CRM, and also to a business' social media strategy.

Cases

The Cases section in BlueCamroo enables customer issues to be recorded, progressed and closed in a controlled, consistent and visible fashion. Each case is related to the relevant Customer, the person raising the case, and optionally to a Project, Project Stage or Product. Case Statuses are user-defined to fit your business processes and practices, and Workflow Rules enable automation of escalation and follow-up.

Support Ticketing

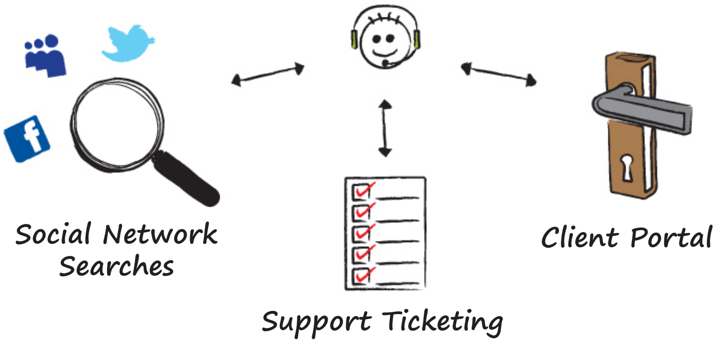
BlueCamroo features a customer support ticketing system. It takes the form of case reporting that allows a user to manage support cases relating to customers, projects, or associated products. Cases can have their own set of tasks, ensuring the correct team members get assigned to resolving the issue, and their own discussions.

Working with Social Media

Often, these days, the first you may hear from a customer with a complaint or service issue is when they post an update on Twitter, or on your company Facebook page. Customers have learned that raising issues in these public forums often gets a quicker and more accommodating response than a direct contact to Customer Service via traditional, less public channels. And they expect you to respond – fast!

To help you identify these online contacts, BlueCamroo's Social Scout feature enables you to define Customer Service Searches that watch Twitter and Facebook for issue updates that concern your business and products. Customer Service staff can generate cases directly from these updates, allowing them to be managed and tracked alongside requests received via traditional channels. They can respond via the Social Network, email or via phone.

By integrating social and traditional support channels, BlueCamroo helps you remove issues quickly from the online social realm into direct communication channels where they can be resolved with less impact on other customers.



Client Portal

Clients to whom you have given External User Portal access, for example to collaborate with you on a project, are able to raise cases directly in BlueCamroo, to see your Case Comments (but only those you choose to share!), and to add their own responses. Other customers can raise cases by emailing a dedicated email address that automatically generates a Case in BlueCamroo.

> *We've been with BlueCamroo for over a year, but only just got started using your 'Support Ticket' feature with cases. We love it! It's making life easier for all my team who answer customer requests, the 'ticket' format reassures customers that we have a process to respond to them, and I can see at a glance we're meeting our goal to close all tickets every day.*

The growth of online social networks and microblogging platforms like Twitter, LinkedIn and Facebook is changing the face of Customer Relationship Management (CRM), as connected customers set the agenda for how and where they communicate with brands, and increasingly refer to each other for information and recommendations.

Around the world, CRM system vendors are scrambling to update their products and position them as "Social CRM". BlueCamroo was in the forefront of this trend, starting with the introduction of our Social Scout module back in October 2010, and we're continuing to innovate new ways of plugging in to these key customer channels. Perhaps more than any other CRM vendor, our patent-pending architecture, that focuses on the Person and Relationship level as much as the Organization level, positions BlueCamroo to keep on leading in this space where the ability to track and manage interactions and relationships at the individual person level becomes ever more important.

View & Share Social Updates

BlueCamroo allows you, and every member of your team, to configure a set of social network accounts to view and post within BlueCamroo. Each individual can set their own sharing rules, giving close teams the ability to post on each other's behalf and view updates from a greater universe of contacts than they might individually be able to access.

Company Facebook Page admins can post to both their own page and the company's.

'Mind-read' Contacts before you call

For every contact you have in your BlueCamroo database, adding their social network identities allows you to 'mind-read' before making a call or send an email. BlueCamroo lets you see at a glance what your contact has been posting to each network – all right there in the customer record – so you can avoid calling at an insensitive time, or take advantage of a great conversational opening.

Find Sales Opportunities

More than 400 million tweets will be sent today, and some of those will be people asking the 'Twitterverse' where they can source exactly the service you provide. Your only challenge is to hear them over all the noise!

BlueCamroo's Social Scout can help. Using a Sales Opportunity Search, you can configure keywords you'd like to listen for on Twitter (and on Facebook for updates published with 'public' permissions). BlueCamroo combines these with 'buying signals' such as "we need", "I'm looking for" and "Can anyone recommend", to filter out much of the noise and bring you back results with a high proportion of actionable sales opportunities. Just a couple of clicks and you can add these as leads, to respond back via Twitter, or to follow up offline.

Support Clients & Listen to the Buzz

In addition to Sales Opportunity Searches, BlueCamroo enables you to configure searches for customers raising issues about your company or products, and to create a Case for follow-up. You can also tap into network 'buzz' around your industry by searching for relevant keywords appearing with strong sentiments – "rocks" "sucks" "epic" "fail", and so on. All searches and filters are completely configurable, so you can tune them for just the kinds of result that interest you.

Take Action

Spotting relevant tweets, posts and updates is only half the battle. Like a fast-flowing river, the stream of social communication is rushing by, and individual messages disappear in moments. BlueCamroo lets you save relevant messages to your customer's record, and create Tasks, Events or Cases for follow-up with just a few clicks.

Work Smart

BlueCamroo helps teams work better together, and individuals be more productive and organized. Bringing all your data and activities together in a single web-based solution cuts down on duplication, errors and re-entry of data, and ensures all your critical information is accessible wherever and whenever you need it.

Update Streams

Whatever data you access in BlueCamroo – be it a customer or a project, an opportunity or a case – each record has its own Update Stream. Just like posting on a Facebook page or a LinkedIn profile, simply post an update to keep colleagues in the loop on status and progress.

But that's not all: BlueCamroo updates can also include patent-pending 'Next Steps'. So you can share a note of your conversation with a Lead, for example, and also what needs to be done to move them along towards their first piece of business.

Follow What's Important

BlueCamroo's Watch List lets you keep tabs on any leads, projects, opportunities or other data that you're specially interested in, and brings all their Update Streams together on a single screen. And by scheduling a Follow-Up, it's easy to mark any record for review a set period of time in the future.

Tasks

Tasks are everywhere in BlueCamroo. Create tasks for yourself and for colleagues, and use Notifications and Reminders to make sure things aren't missed. Update tasks with Progress to track time and record activity.

BlueCamroo tasks include a powerful system of Accountability Management, requiring all assigned tasks to be Accepted or Rejected by the assignee, so you can see at a glance if your task has been accepted. BlueCamroo also automates and controls task re-assignment, so everyone always knows exactly who is accountable for each active task.

Email

Send and receive email via BlueCamroo; forward external emails to a 'Drop Box' address; or connect directly from Gmail using BlueCamroo's Contextual Gadget for Google Apps. Emails can be associated to any type of data record in the system, making it accessible to all users who have permission to the related record.

Expenses Management

Personal business expenses can be easily recorded on Expense Sheets, and routed for approval and payment by designated managers. The approvals routing and definition of Expense Categories is fully configurable by the system administrator.

Time Tracking, Approvals and Billing

Allow Users to record and report time against Projects, Cases and all other data types. Time is easily recorded while closing or adding progress to tasks; while posting to an update stream, or while updating a case. Additionally, built-in Timers make it easy for each team member to keep track of time spent on activities during the day, and to post it up to their personal timesheet for approval whenever convenient.

A special feature of BlueCamroo time tracking enables the system to process Billable Time directly onto a Project Invoice, making use of each user's billing grade and other user-configured rules.

Calendars

Each BlueCamroo User has a personal Calendar, enabling Events to be associated to Leads, Customers, Projects and other data around the system. Calendars can be shared to allow other users to view and add events, and synchronized to either Google Calendar or Microsoft Exchange (Version 2007 and beyond).

Personal To Dos

You don't need to share with the whole office that you need to buy milk and pick up your laundry. Personal To Do Lists are ideal for day-to-day activities that don't need to be managed as Tasks.

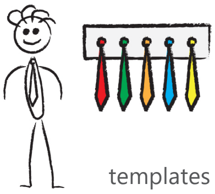
Personal Preferences

In addition to organization-wide preferences set by the System Administrator, each individual BlueCamroo user can set their own preferences for a range of settings, including calendar display; default landing pages; date formats and more.

Automate & Customize

Every business is unique, so BlueCamroo makes it easy to customize your workspace for the way you operate. Whether by customizing themes and email templates to match your branding, or adding Workflow Rules to automate day-to-day tasks, it's easy to make BlueCamroo your own.

Preferences & Settings



BlueCamroo gives you a great deal of control with simple setup options. Whether it's cosmetic features like choosing a colour-scheme, uploading a favicon or adding your logo to email templates and invoices, or more functional settings like defining sales stages and lookup values, it's straightforward to set the options you require.

Web-to-Lead

Integrating with your website is

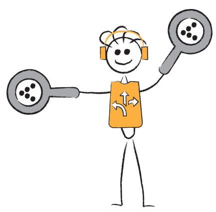
a snap. Simply pick the fields you want to include in your web form, and BlueCamroo generates the HTML code you need. Just paste it into your web page (or ask your web developer) and you're connected!

Control User Access

BlueCamroo makes it easy to share data openly, or to control access. User permissions manage access to every section of the system, and even allow you to control ownership and access down to the individual data record.

Apply Workflow Rules

Whenever data is added or changed in BlueCamroo, you can trigger a Workflow Rule. So whether you want to create a task or send an email to a customer, Workflow Rules can save time and ensure things aren't missed.



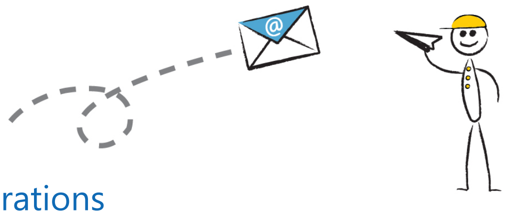
Invoice & Get Paid

BlueCamroo lets you manage invoicing your way. Create your own invoice templates; define your terms and set BlueCamroo to chase overdue payments. Automate recurring invoices for regular charges; manage Pre-paid Items; and simplify Project stage billing.

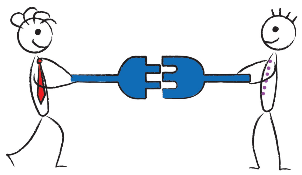
Take card payments online with BlueCamroo using Authorize.net, Chase PaymentTech, FirstData, Moneris or Paypal

Follow Up with Drip Email Marketing

Harness BlueCamroo's Campaign Manager to launch automated campaigns based on triggers you define. Added a new lead? Campaign Manager can respond to automatically send out a series of welcome and orientation emails.



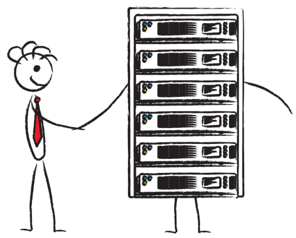
Integrations



Enable Google Apps and work with BlueCamroo inside Gmail, integrate Drive, and synchronize Calendar; connect Quickbooks or Xero for joined-up accounting; get paid online with popular payment processors; share files and documents with Box.com; or synchronize calendar with Microsoft Exchange. And from February 2014, extend BlueCamroo's lead capture abilities by integrating Hubspot's digital marketing platform.

Connect Other Systems

The BlueCamroo API allows data to be shared and updated by other systems. All functions available to system users are also accessible via the API.



At BlueCamroo, our goal is to provide the most complete and best value all-in-one business tool for small- and medium-sized businesses. With a unique, patent-pending CRM concept and architecture that truly fits the way business works today, and developed from the ground-up as a single, integrated solution, BlueCamroo is a great choice for your business, now and for the future.

"... BlueCamroo simply meets the needs of today's business!"

Feature Checklist

Customer Relationship Management (CRM)

- Lead Capturing
  - *Leads Import*
  - *Web-To-Lead & Web-To-Opportunity Forms*
  - *Lead Capture from Email*
  - *From Social Networks (Twitter, LinkedIn, Facebook)*
- Lead Distribution
  - *Leads Sharing*
  - *Configurable Rules*
- Lead Qualification
  - *Configurable Categories*
  - *Rules Based Profiling*
- Lead Nurturing
  - *Contact Recording and Planned Follow-up*
  - *Email Marketing*
- Sales Pipeline Management
  - *Opportunity Tracking*
  - *Pipeline Dashboard*
- One Click Lead to Customer Conversion
- Customer Profiling
  - *Contact Roles Identification*
  - *Opportunity Tracking*
  - *Opportunity Nurturing*
  - *Contact History*
  - *Email Marketing*
- Managed Access to Customer Data
  - *Permission Based Access*

Social CRM (SCRM)

- Monitor Multiple Facebook and Twitter Feeds
  - *Save Messages*
  - *Create Lead or Customer from Message*
  - *Create Case from Message*
  - *Create Task to follow up Message*
- Post under Multiple IDs
- Metrics
  - *Keyword Metrics*
  - *Sentiment Metrics*
- Channel Searches
  - *Sales Opportunity Channel*
  - *Buzz Channel*
  - *Client Support Channel*
  - *General Search Channel*

Customer Support Management

- Customer Cases / Issues
- Support Knowledge Base
- Email-based Support Tickets Automation
- Cases / Tickets Dashboard

Mobile Website Access for:

- iPhone & iPad
- Android
- Windows Mobile

System Support and Documentation

- Context Sensitive Help
- Help Videos
- User Guide

Web Development Platform

- Build & Manage Standard Websites
- Build & Manage eCommerce Websites

Project Management (PM)

- One Click Opportunity to Project Conversion
- Automation
  - *Project Templates & Stage Templates*
  - *Autoscheduling*
  - *Configurable Workflow Rules*
  - *Invoicing Management*
- Stage and Tasks Dependencies
- Visual Time Line
- Visual WorkBench for Projects
- Workspace Collaboration Bridge
- Resources Management
- Project Amendments Management
- Personal To-Do List
- Internal and External Project Roles
- Online Client Sign-off
- Event Scheduling
- Tracking and Reporting Billable / Non-Billable Time
- Estimates and Budgets
  - *Budget vs. Actuals Tracking*

Collaboration

- Sharing
  - *Calendars*
  - *Timesheets*
  - *Document Library*
  - *Notes*
  - *Leads/Contacts/Cases/Opportunities/Projects*
- Task and Accountability Management
- Update Streams
- Support Knowledge Base
- Alerts and Reminders
- Drop-box for Email, Tasks, and To-Dos
- What's New List
- Event Resources Management
- Email Integration

Email Marketing

- Static and Dynamic Email Lists
- Opt Out Tracking
- Configurable Email Templates
- Campaigns
  - *Immediate Send/Scheduled/Triggered*
- Email Click-through and Tracking Analytics
- Automatic CSS Inlining
- Rich Content / Text Only Email Versions
- Campaign Analytic Reports

External User Portal

- Customer and Supplier Access
- Project Collaboration
- Signoffs and Approvals
- Invoices and Payments
- Customer Support Cases

Reports and Dashboards

- Analytic Dashboards
- Standard Reports
- Custom Report Builder
- Export Reports to Excel / CSV
- Export Reports to Presentation-Ready PDF

Pricing and Invoicing

- Products and Services Catalog
- Customer Pricing
- Invoicing
  - *Invoice Templates*
  - *Automatic Invoicing*
  - *Invoice Reminders*
  - *Recurring Invoices*
  - *Pre-Paid Items*
  - *Payment Requests*
  - *Online Payments*
- Multiple Sales Quotes
- Time Tracking with Approval Management
- Multiple Task "Stopwatch" Timers
- Automated Timesheet Posting to Invoice
- Expenses Tracking with Approval Management
- Top-down Snapshot Views
- Work with Multiple Currencies
- Flexible Taxation Setup
- Define Allowable Countries

Customization

- UI Customization
  - *Themes*
  - *Customizable internal login screen*
  - *Favicon*
  - *Style Sheet (CSS) Override*
- Flexible Preference Setup
  - *Company*
  - *User*
- Extra Fields throughout all Details Pages
- Extra Data Objects (Custom Tables)
- Canned Responses
- Templates
  - *Projects*
  - *Stages*
  - *Email*
  - *Invoicing*
  - *Notifications*

Integrations

- Google Apps for Business
  - *Gmail*
  - *Calendar*
  - *Drive*
  - *Sharefile*
- Accounting
  - *Quickbooks*
  - *Xero*
  - *Freshbooks*
- Payment Processors
  - *Authorize.Net*
  - *Chase Paymentech*
  - *Moneris Solutions*
  - *PayPal (Standard and Pro)*
  - *FirstData*
- Other Integrations
  - *Box.com (Online File Sharing)*
  - *Outlook/Exchange Server (Calendar)*
  - *HubSpot (Digital Marketing)*
- Application Programming Interface (API)

BlueCamroo **Pricing**

CRM + Project Management + Customer Support + Business Automation & more...

One system. One price.

No contracts to sign, no commitments, no hidden fees, no worries.

BlueCamroo No-Nonsense Pricing

$41

per User/Month[1]

billed annually

(or $49 month-to-month)

All prices are in US Dollars and subject to GST/HST for subscribers in Canada.

Includes Full Functionality and:

- Unlimited Leads ✓
- Unlimited Accounts ✓
- Unlimited External Users (2) ✓
- Unlimited Contacts ✓
- Unlimited Opportunities ✓
- Unlimited Projects ✓
- Unlimited Workflows ✓
- Unlimited Cases/Support Tickets ✓
- Email Marketing (3) ✓
- Social CRM (4) ✓
- Workflow Rules ✓
- Time Tracking ✓
- Expense Reporting ✓
- Invoicing and Payments ✓
- Enhanced Security ✓
- API (5) ✓
- External User Portal ✓
- Mobile Website Access (6) ✓

(1) A BlueCamroo User is a user that is internal to your company. They will have access to all areas within the system and will help you get your work done.

(2) External Users are your customers and suppliers. They access selected BlueCamroo Data via the External User Portal.

(3) Email Marketing using your own SMTP server for email distribution is FREE within all plans. Optional access to BlueCamroo's SMTP server for bulk email marketing is available if required, subject to additional charges.

(4) Social CRM includes comprehensive integration with the most popular online social networks.

(5) API - Application Programming Interface.

(6) Access BlueCamroo with Apple, Android and Windows Mobile Devices.

Scan here with your smartphone to visit BlueCamroo

For more information and to register for a Free 14 day trial, please visit our website at www.bluecamroo.com or send us a personal inquiry email to info@bluecamroo.com

BlueCamroo Services

Training, Consultancy and Implementation Support to help you succeed

Many organizations plan, set up, and deploy BlueCamroo independently. Others, however, prefer to have help defining how they want to use BlueCamroo within their business, to make sure they are taking best advantage of all its capabilities. Furthermore, organizations that have not previously implemented business solutions such as CRM Project Management or Workflow Management often require guidance on implementation planning, or the change-management aspects of achieving a successful roll-out.

Whatever level of help you require, our experienced consultants, engineers and configuration experts are on hand to help make sure your roll-out is a success. We offer a range of pre-defined service packages to suit all sizes of business.

Accelerator Packages

Get training and hands-on assistance as you deploy BlueCamroo in your business. Your BlueCamroo Accelerator Coach will work with you throughout the process.

BlueCamroo Accelerator Packages combine a number of carefully-chosen Flex Services that provide initial consultation, creation of an implementation plan, system setup, assistance migrating data and training for your System Administrator and general staff. Each Accelerator Package includes an allowance of additional Flex Service Units that you can use to focus additional assistance in whichever areas are most important to your successful launch.

Flex Services

Keep control of your implementation costs by picking from a menu of pre-defined, fixed price services that address common needs such as basic system configuration, data import, marketing campaign setup, training workshops, and template customization.

Each Flex Service requires a defined number of Flex Units, allowing you to exchange services within our Accelerator Packages for alternative Flex Services of equivalent value.

Flex Units are priced currently at $145 each.

Custom Projects

Work with BlueCamroo consultants, engineers and configuration experts to meet demanding requirements for advanced process design, project management, configuration, training services or integration of BlueCamroo to existing company systems or third-party solutions.

- ✓ Business process redesign
- ✓ Change Management
- ✓ Systems Integration
- ✓ Software Development
- ✓ Localization

Success Guarantee Program

When implementing a system such as BlueCamroo, success depends upon 3 things:

Fit	Choose a system that is a good fit for your business.
Execution	Plan thoroughly. Set up right. Migrate data ahead of time. And provide effective training and change management.
Commitment	Lead from the front, and be prepared to stick at it.

For organizations where we see a great Fit and the necessary Commitment, our unique BlueCamroo Success Guarantee Program offers a full money-back success guarantee.

BlueCamroo offers a variety of pre-defined Accelerator Packages, which can be extended or customized by choosing from our wide menu of Flex Services (detailed on the BlueCamroo website). The table below details the services that make up one such package – our ***BlueCamroo Accelerator*** package.

Sample Accelerator Package: BlueCamroo Accelerator - Up to 10 Users	Price
Want to get up and running fast? The BlueCamroo Accelerator Package is designed for you! With the BlueCamroo Accelerator Package, your dedicated *'RooMaster* works to understand your business and help you through all stages of setup. Additionally, your *'RooMaster* will call on BlueCamroo's team of data and implementation specialists to help you load your system data, and get everyone trained and on board, ready to be effective right away. The BlueCamroo Accelerator Package includes the following: ✓ ***Online* consultation*** to review your business processes and requirements, and establish how you will manage your business within BlueCamroo (1 hr) ✓ System Design – following your initial consultation, your *'RooMaster* will provide a System Design Document, detailing the system settings and other preparation required to configure BlueCamroo for your business. ✓ System Implementation Plan – your *'RooMaster* will provide a Project Plan, including all required technical, data-loading, training and change management activities to successfully implement BlueCamroo within your business. ✓ Review Meeting – your *'RooMaster* will meet with you online* to review the System Design Document and System Implementation Plan, answer any questions and agree necessary changes. (30 mins) ✓ System Training for your chosen System Manager (1 hr – Online*) ✓ Included ***Flex Services***, to configure your system and import base Contact Information • Basic System Setup (2 Flex Units) • Extra Data Setup (1 Flex Units) • Data Appraisal (2 Flex Units) • Contact Data Import (4 Flex Units) *(Included Flex Services can be swapped for any other services from the full list of BlueCamroo Flex Services)* ✓ ***Group Training*** for all system users (1 hr – Online*) ✓ 4 x 30 min online* ***Checkpoint Meetings*** for your System Manager – usually taken 1 each week in the first 4 weeks of implementation / roll-out. ✓ ***4 Additional Flex Units***, enabling you to choose additional setup assistance, data, training and other services from our full range of Flex Services (Flex Units must be used within 6 months.)	$2,750

For other packages, and to inquire about on-site training and implementation services, please contact: services@bluecamroo.com.

do more with bluecamroo®

blue camroo

3100 Steeles Avenue West, Suite 400 Concord, Ontario L4K3R1 Canada
www.bluecamroo.com • info@bluecamroo.com