

## BlueCamroo Release Notes

April 7, 2010

### Welcome

These release notes represent a detailed overview of BlueCamroo's first major revision. BlueCamroo is an evolving system and over the coming months and years BlueCamroo's interface and feature set will adapt to feedback and the latest technology changes.

If you have any comments on these changes or wish to suggest a future change, please email us at [feedback@bluecamroo.com](mailto:feedback@bluecamroo.com).

### What's New in BlueCamroo?

Today, we are releasing a number of significant new features, and enhancing many existing features, in order to:

- Provide clear control and visibility of Task creation, assignment and completion.
- Log all data updates, and provide full History and "What's new" reporting.
- Help teams schedule events efficiently, with Calendar Sharing and Resource Calendars.
- Improve interaction with external email, by implementing an internal messaging system for routine communications, and providing new "drop box" capabilities to send external emails into BlueCamroo.
- Deliver multiple detailed improvements to processes, preferences and displays.

Below you will find a complete list of recent changes, and the actions you and your team will need to take to make best use of these.

### Tab Changes

The **Home** tab has been separated from the other tabs. A new **Tasks** tab is now grouped with the **Home** tab.

The **Reports** and **Time Sheets** tabs have been removed. These options are now available by clicking on the **Home** tab and accessing the **Left Pane Toolbar** menu, where **Reports** and **Time Sheet** have been added as options.

### Today View

The **Home** tab now defaults to the **Today** page. This displays the user's Due and Overdue tasks, and Events scheduled for today.

Future events can be accessed using the **Home** tab's **Left Pane Toolbar**'s **Search | Events** option, or browsed on the Calendar.

### What's New

The **Home** tab's **Left Pane Toolbar** now has a **What's New** option. **What's New** lists recent data additions and modifications, and allows the user to click through directly to relevant details.

### Search Option

The **Home** tab's **Left Pane Toolbar** now has a **Search** option, which was previously located in the Reports tab. You can search on and display events, emails, messages, attachments, notes, and the delete log.

## Tasks Tab

A **Tasks** tab has been added to the main tab row and grouped with the **Home** tab. There are three pre-created, default Views of tasks:

- **Tasks I have assigned** displays uncompleted tasks that the user has created and assigned to other users, together with an indicator of whether the Assignee has Accepted each task.
- **New Tasks assigned to me** displays uncompleted tasks that other users have created and assigned to the active user, and that have not yet been Accepted.
- **My Tasks** displays uncompleted tasks that the active user has created for him or herself, together with tasks created by others that the active user has Accepted. (Note: When an assigned task is Accepted, it is removed from **New Tasks assigned to me**, and displays instead in **My Tasks**.)

Users can create their own additional custom views, to display both uncompleted and completed tasks, filtered by a variety of criteria.

## Call and Message Task Types

When creating a **Task**, it is now possible to specify the **Task** as being a **Call** or **Message** type task. **Call** and **Message** tasks have additional options to specify the contact method to be used, and also have dedicated processing to complete the Task.

## To Dos

A **To Dos** sub tab has been added under the **Tasks** tab. The **To Dos** tab lets you quickly create "to do" lists and items on those lists.


Note: **To Dos** are intended as a convenient way of managing personal

tasks that don't need the full power of Tasking. **To Dos** can not be assigned to other users, and are not logged or reported in **What's New**. They can, however, be converted to Tasks to take advantage of full **Task** functionality.

## Messaging

BlueCamroo now supports an internal messaging system (in addition to external email interactivity). Routine tasking messages do not go to a user's linked email but remain within the BlueCamroo system. To access messaging, click the **Home** tab. Click the **Inbox** option under the **Left Pane Toolbar**. The **Inbox** page displays both internal messages and external Internet email communications.

## Entering Dates

Previously, when you clicked in a date field BlueCamroo popped up a calendar. You can now either enter a date directly into the field or click the **Calendar**  icon to enter a date via a calendar popup. Note that only day and month value ("dd/mm", or "mm/dd", depending upon the user's regional preference setting) is required to enter a date; BlueCamroo assumes the current year. Time is now entered directly into a time field. It was previously entered via a drop-down box.

Both date and time entries can be adjusted by using up and down arrow "spinners".

## Task Actions

Tasks now have an **Action** option. In a list of tasks, each task has an associated Action link. When moused-over, it produces a popup menu of action options: **Accept**, **Reject**, **Add Progress**, **Close**, **Cancel**, **Reschedule**, **Re-Assign**, **Create Sub Task**, and **View Full Detail**. If you edit a task, the Action options are also available on the task detail page.

Action	Description
<b>Accept/Reject</b>	A Task that is assigned from another user must be Accepted or Rejected before any other processing can take place.  Acceptance / Rejection is automatically notified to the Assignor.
<b>Add Progress</b>	Adds details about what progress is being made on this task, and enables adding Billable or non-billable time
<b>Close</b>	Marks the task as completed. Like <b>Add Progress</b> , also enables adding Time.
<b>Cancel</b>	Marks the task as canceled.
<b>Reschedule</b>	Lets you set a new due date.
<b>Re-Assign</b>	Allows you to transfer the task's responsibility to another user.  Note that a Reassigned Task remains the Re-Assigning user's responsibility until Accepted by the new Assignee, and therefore remains in his/her My Tasks view.
<b>Create Sub Task</b>	Lets you create a sub task that must be completed before the parent task can be closed.

Action	Description
<b>View Full Detail</b>	If you are editing the task as a popup dialog box and you prefer to view the dialog as web page, click this option. This option is only available from the <b>Action</b> menu in the detail popup.
<b>Ask a Question</b>	Lets a user ask a clarification question regarding an assigned task.

### Leads, Accounts, Contacts, Opportunities, Projects and Cases Overview Pages

When you click one of the above tabs, the Overview pages have been modified. Task and event listings have been removed. All tasks are now visible by simply clicking the main **Tasks** tab.

If you click on a particular lead, account, etc. the Activities page now shows Tasks and Calls under the secondary **Tasks** tab. Events are listed under their own secondary **Events** tab. Emails are accessible by clicking the **Messages** link under the **Left Pane Toolbar** (while in editing mode).

A **History** option has been added to the **Left Pane Toolbar** when in editing mode. If you click the History option you will see full **History** for that particular lead, account, contact, etc.

### Project Tasks

Project Tasks now have a **View by Client** checkbox. Checking this allows the client to see the task details via an intranet login.

## Right Pane Functionality

A **To Do** option has been added to the **Show Me** drop-down box. In addition to displaying system stats and summaries, you can display and work with your To Do items in the right pane.

## Setup – System Administrator

New options and changes have been made to BlueCamroo Setup:

**Preferences:** Company Preferences allows the System Administrator to define date/time formats, working hours, and what initial information displays when you open a specific lead, account, contact, opportunity, project, or case.

**Working Hours** preference determines the default start/end time for tasks that have Due or Start dates, and also the initial times displayed for scheduling Events.

**Resources:** Under **Company Setup** a **Resources** option has been added, that allows separate Calendars to be created and maintained for physical resources such as Meeting Rooms, AV Equipment, etc. Resources – such as the Company Boardroom, for example – can then be added to Events together with meeting participants to prevent double-booking.

**On Hold Status:** The Task Statuses Lookup Value has a new defined status called "On Hold". It can be used to flag a task that is no longer in progress but has not been canceled. If a task is given a sub task or a question is asked of a task, the status will automatically be set to **On Hold**. Users should note this new automatic status when using the new sub tasking and question functionality.

**New Email Templates:** Under the **Automation** option, new templates have been added for **Task Accept**, **Task**

**Reassign Accept**, **Task Rejection**, and **Task Progress**. Please review these new templates and customize them for your office if required. In addition, a **General Internal Message Template** has been added, performing a similar function to the **General Email Template**, but for Internal Messages.

**Project Templates Now Support Dependencies:** Stages and tasks you create for project templates can now be configured with dependencies. Please review your existing project templates to see if they can take advantage of this new feature.

**Attachments for Project Template Tasks:** When you create a task as part of a project template, you can automatically include an attachment. Please review your existing project templates to see if they can take advantage of this new feature.

**Defer Task Assignment in a Project Template:** When creating a task in a project template, you can leave the **Assign To** field blank. Please review your existing project templates to see if they can take advantage of this new feature.

**Time to Complete Option in a Project Template Task:** An estimated elapsed **Time to Complete** field has been added to the task dialog when creating a task for a project template. Please review your existing project templates to see if they can take advantage of this new feature, which enables automatic "first draft" scheduling of projects created from a Project Template.

## Personal Preferences

Each user should be encouraged to review and customize the new Personal Preference options.

**Calendar Sharing:** Under **Personal Setup**, users can give and revoke the

ability for other users and/or defined groups to see their calendar and the various tasks and events on the calendar.

**Personal Preferences** also allow the individual user to override default preferences for date formats, start of week day, working times, etc.

## Email Drop-Box

The ability to interface with BlueCamroo via email has been extended. The table below ("Email Options") is a list of the email aliases you may use and

descriptions of available email processing.

**Note**, in the examples replace "clientdomain" with your unique Bluecamroo domain. For example, if you access Bluecamroo with the browser address:

<https://GeneralSupply.bluecamroo.com>

then use *GeneralSupply* instead of *clientdomain*.

## Email Options

Mode of Use	Outcome
<p><b>Sending Email from BlueCamroo</b></p> <p>A logged-in user can send email from BlueCamroo to a lead or contact. Optionally, the user may BCC him or herself.</p>	<p>When an email is sent to a lead or contact, the email address entered under the user's <b>Personal Information</b> setup page is used as the From address.</p> <p>Sent email is filed under the message section of the relevant Lead, Contact, Project, etc.</p> <p>If the email was BCC'd, the user will receive a copy in his/her own Outlook or other Email Client inbox.</p>
<p><b>Lead/Contact Replying</b></p> <p>Leads and contacts can reply to your BlueCamroo-generated emails.</p>	<p>Email header coding directs replies back to BlueCamroo. The reply is filed with the original outbound email.</p> <p>BlueCamroo will also display the email in User's 'Inbox' under Home tab.</p> <p>BlueCamroo will also send a copy of the Email directly to the user's normal email account.</p>

Mode of Use	Outcome
<p><b>Entering Non-BlueCamroo Email Correspondence into the System</b></p> <p>At times you will email a lead or contact directly from outside the BlueCamroo system (e.g., from Outlook). You can ensure this email gets entered into BlueCamroo by placing <b>email@clientdomain.bluecamroo.com</b> in your <b>BCC</b> field.</p>	<p>BlueCamroo recognizes:</p> <ul style="list-style-type: none"> <li>• The <b>From</b> address as a BlueCamroo user, and</li> <li>• The <b>To</b> address as a Lead or Contact</li> </ul> <p>BlueCamroo automatically associates the Email to the relevant Lead/Contact.</p>
<p><b>Forwarding Lead/Contact Correspondence to the System</b></p> <p>If you have received an email from a lead or contact to your Outlook or other email client and wish to enter it into the BlueCamroo system, forward the email to BlueCamroo using the email@ alias in the <b>To</b> field.</p> <p><b>email@clientdomain.bluecamroo.com</b></p>	<p>BlueCamroo recognizes the <b>From</b> address as a BlueCamroo user, and places the email in his/her Inbox.</p> <p>BlueCamroo has no information with which to relate the email, and the User must therefore do this manually from the BlueCamroo Inbox.</p>
<p><b>Adding a Task Via Email</b></p> <p>If you are out of the office and want to add a task with basic information via email, you can email:</p> <p><b>task@clientdomain.bluecamroo.com</b></p>	<p>BlueCamroo recognizes the user's <b>From</b> address, and creates a Task with the following details:</p> <ul style="list-style-type: none"> <li>• Task Owner – User</li> <li>• Task Subject – Email Subject Line</li> <li>• Task Description – Email Body</li> </ul> <p>When next logged in to BlueCamroo, the User can set further details and/or Assign the Task to other users as required.</p>
<p><b>Adding a To Do Via Email</b></p> <p>If you are out of the office and want to add a To Do via email, you can email:</p> <p><b>todo@clientdomain.bluecamroo.com</b></p>	<p>BlueCamroo recognizes the user's <b>From</b> address, and creates a <b>To Do</b> in the user's General To Do List.</p> <p>The <b>To Do</b> is created from the Email <b>Subject</b> line. Any information in the Email message body is discarded.</p>