What's New in BlueCamroo?

The August BlueCamroo update concentrates on bringing greater control and oversight when BlueCamroo is being used by multiple users. The most noticeable change is the **Snapshot** page, which can be the default landing page when you open any record (a lead, account, etc.). Additionally, we've added a new option to Social Network Scout called **Mentions**. The Channel Search bar is now accessible directly as buttons with pop-up menus.

Please read below for detailed overviews of these updates, and how to take advantage of them in your BlueCamroo account.

If you have any comments on these changes or have feature suggestions you'd like to put forward for future updates, please visit our forums or email us.

Snapshots

=(j	Snapshot for Account: Reflexion Design Inc.						
	🗟 3 Open Tasks						
-	Subject			Due Date	Assign	ed To	Status
@		e Colorschei frames webs		2011-08-11	Andrew	Craig	In Progress
	Check store	progress on	lavapub	2011-08-11	Andrew	Craig	Not Started
1	Discus	s lightlite w	ebsite plans	2011-08-12	Andrew	Craig	Not Started
	🚖 1 Me:	ssage					
	From	То	Subject				Date
	Philip Mapa	Lori Lamarello	Andrew ou can we he	it of office - he lp?	DW	2011-	08-09 1:30 PM
Þ	矏 1 Op	portunity					
Ø	Name		Р	hase			Valued At
	Schedu	lling System	A	nalyzing		15,0	000.00 CAD

Need a quick overview of what's going on with a Lead, Account, Contact, Opportunity, Project, or Case? BlueCamroo now provides a new **Snapshot** option. Click on a record and then click the **Snapshot** button on the **Left Toolbar**. **Snapshots** give you an instant summary of current activities, messages, notes, the records change log (history), and other details depending on record type.

Tip: If you would like the Snapshot to always appear first when you open a record, visit **Setup > Personal Setup > Personal Preferences**. Under the **First Page to Display** area, select **Snapshots** for each section desired. Click **Save**, then logout and log back in for the changes to take effect.

Left Toolbar Record Counts

Previously the **Left Toolbar** displayed record counts. For example, the Account **Messages** button displayed the number of messages in an account's inbox. This number, however, only captured the "top level" message count and did not take into consideration messages associated with sub-records like contacts and projects. We've removed the counts and instead now display key counts under the **Snapshot** pages with additional information (e.g., unread or overdue records).

Managing Project Documents

This release we've made some changes to Projects to help you manage shared documents better when multiple users have access to the project record.

C	Documents for Project: Q/A Tracking Sytem	🔊 Quick S
O	Document Details	
₹	Name Design document A high level design document	
	Description	
5	File Name systemdesign.doc	
	Draft	
Do	Save & Close Checkout Lock Checkout History Cancel	

The **Projects** section now offers a **Documents** option. The **Documents** section is similar to the **Attachments** feature but provides the ability to check documents in and out, lock documents (prevent them from being checked in/out), maintain a version history, and leave user comments on each document details page.

The **Documents** feature gives you greater control over sharing important project-related documents with team members but retaining accountability over document modifications.

See the **Document Notifications** below for more information about new email template notifications associated with this feature.

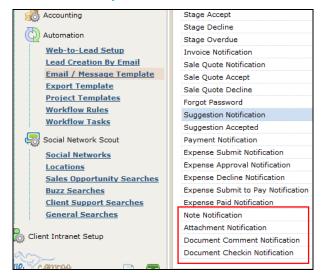
Notes and Notifications

Various records have different comment boxes. For example, when you close a task (or add any kind of progress) you're prompted to leave a comment. When you complete a call you're prompted to leave a comment. These comments were not well centralized. In this release we're pulling together these comments and displaying them under the **Notes** page (click the **Notes** button on the left toolbar to access).

		v	iew All
 Initial 	Planning NO START	DATE - NO END DATE NO STATUS SET	# 8
"" "" === + Add.ne Add.new.st		Adding Progress for Tails Send to Clout for Stage: Initial Planning. LO/A Tracking System _ Bessee Eavy	
		Des 2011-00-10 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	

To file a comment under **Notes**, when you close (or add Progress to) a task, or log a call, there is now a **Display In Note** checkbox under the **Comment** field. If you check this box, your comment will appear as a note. Note text is displayed in full when you click the **Notes** button on the left toolbar. By having close comments left as notes, you can quickly scan the Notes page for any important information left upon task closing.

Notification Templates



We've added four new templates to the **Email / Message Template** page. Access this page under **Setup > System Setup > Company Setup > Automation**. You will find the following email templates:

Document Notifications

Two new templates have been added to provide important notifications when updating and commenting the **Documents**.

Document Comment Notification: If a comment is added to a **Document Details** page, this notification will be used to alert the selected team members.

Document Checkin Notification: When a document is checked in, this notification will be used to alert the selected team members.

Attachment Notification

	chmentProject: Working with Project Templates 123 Abc		
File Name	0.0100	Т	
	Current File: popup_cases3.png		
Url		16	
Description	test	1	
Display In Note	ih.		
Send Notification			
	Team Members		
	🗹 Alex Zetterberg 🔲 Kenny Newton 🗹 Philip Mapa		
	Save or <u>Cancel</u>		

A **Notifications** checkbox has been added to the attachment **Add New** and **Edit** dialog boxes. When checked, you will be given a list of who you want the Attachment Notification to be sent to. The **Attachment Notification** template defines how the email appears.

Note Notification

ig with i roject remplates				
Adding new note for Project: Working with Project Templates 123 Abc				
Note	Testing has been sloppy on Stage 3.			
	body p			
Attachment		Browse Lookup		
Send Notification	V			
	Team Members 🗹 Alex Zetterberg 🔲 Kenny Newton 👽 Philip Mapa			
	Save or <u>Cancel</u>	1		

We've also added a **Notification** checkbox to a **Notes** details page. It works similar to **Attachments**. When checked, you will be given a list of who you want the **Notes** notification to be sent to. **Note Notification** template defines how the email appears.

Undated Tasks

Current Tasks (28)		
😑 Undated Tasks (7)		
	Subject	Related To
	🖀 make a call	
	🔯 Product Idea: waterproof phone mats	
	🕑 Schedule survey	Account: Pentagon Protection
	🕅 reject me	
	🖀 Call Mr. Manner	Lead: Bill Manner
	🕑 car show	
	🛃 task	

Most tasks have due dates. However, it's not mandatory to give a task a due date. There are certain benefits to creating undated tasks. One can use undated tasks as To Dos on steroids. They can be used as general task you need to get to "some time" but with the additional benefits of tracking progress, time tracking, and the ability to assign them to other users or user groups. To make this more manageable, the **Home** tab now has an Undated Tasks section that brings these undated tasks to the fore and keeps them organized together.

Social Network Scout

Channel Search Modifications

Searches:	💀 🛃 🛃 🐼	_
Bry	Sales Opportunities	
109 FOLLOWING		eurs get started online. Ther ful with their efforts. 282 FWEETS
@manojranav Google+ abou 2011-07-28 6	CRM	e doing it right. Also mentioi Iar
2 I I	LinkedInAnswers	

The evolution of the Channel Search interface continues in this release. We've replaced the tabs with icons. Hover over an icon and you'll get a drop-down menu of your configured channel searches.

Mentions



We've added a new button to Social Network Scout's left toolbar. The new **Mentions** button will display any re-tweet or tweet @ featuring your Twitter ID or your company's Twitter ID.

Want to Learn More?

If you want to learn more about BlueCamroo, current changes, or engage in dialog with your fellow users, visit BlueCamroo Community page:

http://www.bluecamroo.com/bluecamroo-community

Check out our message board forums:

http://www.bluecamroo.com/forum/category

Read and comment on our blog:

http://www.bluecamroo.com/blog

Also visit our Help & Support page for tips, FAQs, and additional documentation:

http://www.bluecamroo.com/bluecamroo-help-and-support