

What's New in BlueCamroo?

This release completes our planned update for February 2013. In January we added a number of improvements to various areas of the program (invoicing, leads, task management). In this release, we have reworked the **Dashboard** feature.

The single **Dashboard** has been replaced by a suite of dedicated new **Dashboards** designed to pull together information about Leads and Sales, Projects, Invoicing and Payments, and Cases. The new **Dashboard** design is the first step in giving you better and more powerful new insights into your business. Future releases will add user customization and more granular control over user permissions.

Administrators will want to review the data presented on each dashboard and determine users access to the dashboards. A dashboard permission has been added to the company/group/user levels for administrator control. Right now the permission is an "all dashboards or nothing" setting. A subsequent release will give you finer control.

If you bill in multiple currencies, see the section on the new multiple currencies exchange rate fields.

If you have any comments on these changes or have feature suggestions you'd like to put forward for future updates, [email us](#).

Need More?

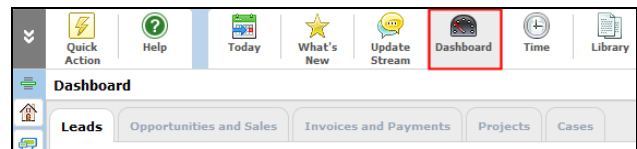
If you want to request a support call, learn more about BlueCamroo or current changes, get expanded help like how-to videos, get FAQs, or even learn how to partner with us, visit the [BlueCamroo Resources](#) page.

Change Item Legend

-  New Feature
-  Modified Feature

Tabbed Dashboards

The old **Dashboard** system allowed you to mount useful graph-based reports on your dashboard. However, graphs only provide part of the information needed in terms of a "one page" overview. A lead, opportunity, sales, project, support ticketing, and invoice management system cannot adequately represent the diversity of critical data via a handful of charts on one page.

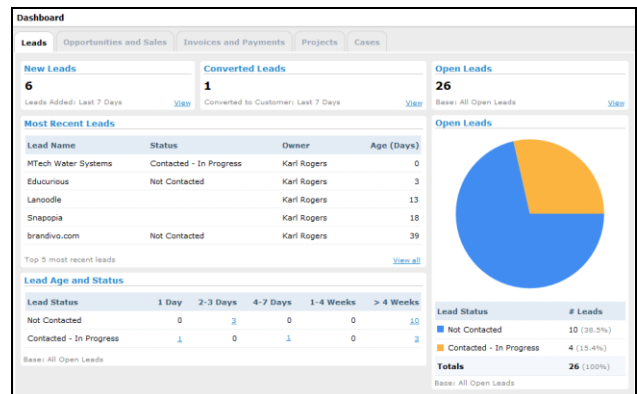


We've torn down the old dashboard and installed a new tabbed dashboard system. Each dashboard has key, critical metrics for the following areas of BlueCamroo:

- Leads
- Opportunities and Sales
- Invoices and Payments
- Projects
- Cases

At this stage, the Dashboards are not customizable. Our next evolution of the Dashboard design will be a fully customizable and configurable version that will roll out later this year.

Leads



The **Leads** dashboard gives you a heads up on the number of new leads that have come in over the last seven days and the number that have been converted (using the **Convert Lead to Customer** option). The **Lead Age and Status** table displays leads by their initial creation date and their current lead status.

Opportunities and Sales

The **Opportunities and Sales** dashboard gives you an overview of opportunities in play, opportunities that have been converted to an approved project (a "sale"), and a **Pipeline Valuation** offering projected sales.

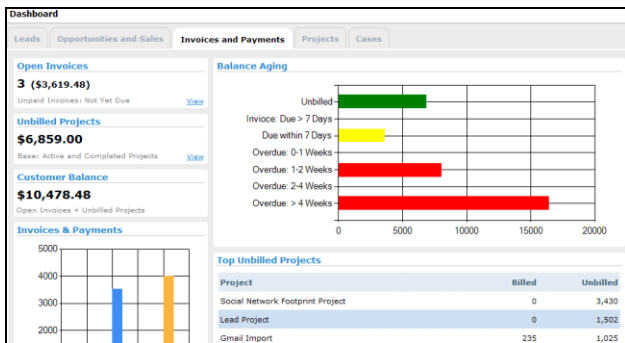
The key metric on this dashboard is the **Pipeline Valuation** table. The table displays potential sales from the start of the month to the current date. The table displays two key values. The "weighted value" and the "raw" value.

Opportunity Phase	Number of Opportunities			Weighted Value (Estimate x Probability)			Opportunity Value (Estimate)		
	At Start of Month	Change (+ / -)	Today	At Start of Month	Change (+ / -)	Today	At Start of Month	Change (+ / -)	Today
	Prospecting	5	-4	1	1,877	-1,807	70	37,540	-36,140
Qualification	1	-1	0	0	0	0	0	0	0
Proposal	0	0	0	0	0	0	0	0	0
Quotation Submitted	3	-3	0	1,580	-1,580	0	5,265	-5,265	0
Negotiation	0	0	0	0	0	0	0	0	0
Total Pipeline Value	9	-8	1	3,457	-3,387	70	42,805	-41,405	1,400
Won - Estimated Value	0								
Won - Actual Value	1,502								
Other Sales	0								
Total Sales (Actual)	1,502								

The **Weighted Value** is calculated by taking the total value of all opportunities in a particular stage and adjusting it based on the probability figure you've set for each **Opportunity Stage**. For example, you have three opportunities in the **Proposal** stage. The three opportunities are valued at \$10,000 in total. The raw valuation would be \$10,000. However, you've determined opportunities at the proposal stage have a 10% chance of becoming a sign contract (that is, a sale or a project). Therefore the weighted value is 10% of \$10,000 or \$1,000.

At the bottom of the dashboard is the **Expiring Quotations** table. It provides a good heads up on submitted sales quotes that have not been approved by clients and are approaching their expiration date.

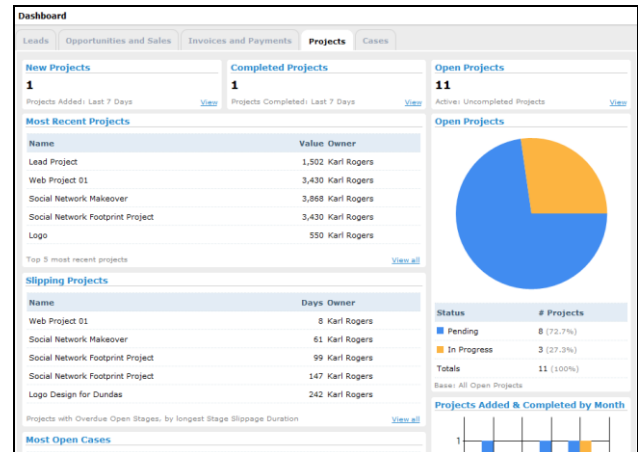
Invoices and Payments



The Invoices and Payments dashboard gives you greater insight into your immediate revenue stream. What money has come in? What remains unbilled? What is owing?

The **Balance Aging** chart features a bar chart displaying invoice amounts. It offers a graphical representation of how much revenue remains unbilled, how much revenue is due, and how much revenue remains late and uncollected.

Projects



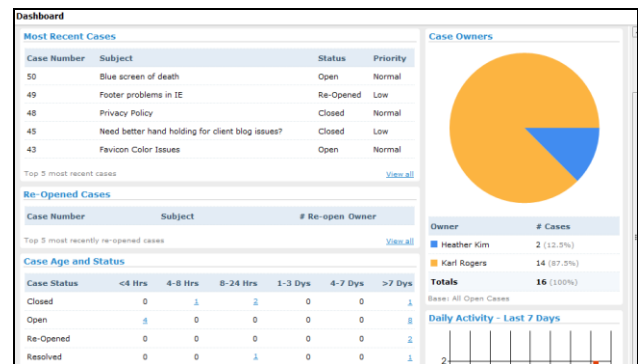
The Projects dashboard has three metrics that bear some attention.

Slipping Projects: This table will alert you to projects with at least one late stage. The project itself might not be late but it's an import heads up on which projects are not meeting their internal deadlines.

Most Open Cases: This table cross references cases associated with a project, ranking them by projects with the most open support tickets.

Unapplied Billable Time: When recording time for a project, you can flag the time logged as billable. On a project's **Time Sheet** (viewable via the project's **Time** option), you can find and apply this time via the **Billing** tab. It is, however, easy to miss or forget to apply this time. This table will alert you to any project with unapplied billable time, hence un-captured revenue.

Cases



The **Cases** dashboard gives you an at-a-glance overview of your support ticketing workflow for the past 7 days. How many new cases have come in? How many have been closed? How many cases are still open and have never been closed? Some important statistics include **Case Age and Status**, alerting you to opened cases that remain unresolved for one or more days.

Closing those View and View All Panels

Many of the tables provide a **View** or **View All** link at the bottom right. Click this link for a pop-out list of all records. To close the window, click in the right-side information panel.

11,760	28-Sep-12
View all	

Lead Name	Status	
MTech Water Systems	Contacted - In	
Educurious	Not Contacted	
Snappopia		
Lanoodle		Karl Rogers
brandivo.com	Not Contacted	Karl Rogers
Tweelance Graphics	Not Contacted	Karl Rogers
Walt Furniture	Closed - No Interest	Karl Rogers
ABC and XYZ corp	Not Contacted	Karl Rogers

Control Access to Sensitive Information with Dashboard Permissions

Not every dashboard is appropriate for every user. We've added a dashboard permission to company/user group/user level access. Currently, administrators can set an "all or nothing" permission. In a subsequent release, we will provide a more granular permission system, allowing administrators to turn on/off access to individual dashboards.

Specifying Exchange Rates

If you're billing and quoting opportunities in different currencies, dashboards with monetary data (e.g., sales, invoices) will be converted to the default currency you've set under **Setup > System Setup > Accounting > Supported Currencies**. You need to set what conversion rates BlueCamroo uses for non-default currency data conversion.

Name	Currency Code	Symbol	Active	Default Currency	Exchange Rate
US Dollars	USD	\$	✓	✓	1
Canadian Dollar	CAD	\$	✓	✗	0.98
United Kingdom Pound	GBP	£	✓	✗	1.4 USD

Make the rates as accurate as possible although don't sweat day-to-day differences unless one of your currencies is in serious free fall. This conversion rate is only used for dashboard approximations and projections ("spit balling"). It won't affect your actual billing.

The **Exchange Rate** is relative to the default currency which is always set at 1. The additional currency exchange rate should be a decimal value of what one of the additional currency units is worth in the default currency. If you don't follow that sentence, don't feel bad. Let's say your default currency is the US dollar. You have British pounds as an additional currency. You've made a sale of 1 GBP. BlueCamroo needs to convert that to US dollars for your dashboard. 1 GBP would mean about \$1.40 in your default currency. So enter 1.4 in the **Exchange Rate** field. In short, currencies more valuable than the default will be greater than one. Currencies less valuable will be less than one.

Excluding Closed Leads from Dashboard Reports

Status	Dashboard Report
Not Contacted	✗
Contacted - In Progress	✗
Contacted - No Current Requirement	✗
Closed - No Interest	✓
Closed - Stale	✗

We've added functionality to the **Lead Status Lookup Value (Setup > System Setup > Lookup Values > Lead Statuses)** to exclude closed leads from the dashboard. You can now set whether a custom lead status represents a "closed" condition or still represents a lead open and in play.

