What's New in BlueCamroo?

November's BlueCamroo has a number of changes under the surface. We've made improvements to how BlueCamroo communicates with its database and we're preparing the system to handle a full-fledged API. The API (a way for your own programs to talk to BlueCamroo) is slated for release at the end of the month. However, there are a few important changes at "periscope depth" that you should be aware of. Please read below for detailed overviews of these updates.

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

Invoices and Payments

We've increased the flexibility of our payments system. Several changes have been made on the setup side as well as the process of adding/editing invoices.

Taxes

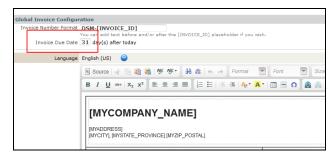
| Region Info | rmation | | |
|-------------|---------|--------------|------------|
| Country | Canada | | |
| Region Name | Quebec | | |
| Region Code | QC | | |
| tegion Tax | | | |
| Tax Name | | Tax Rate (%) | Cumulative |
| | | 5 | |
| GST | | | _ |
| GST PST | | 8 | V |

BlueCamroo now supports cumulative tax calculations for country regions. Some regions (notably Canada's Quebec province) that apply a sales tax cumulatively. That is to say, the sales tax is calculated based on the price plus a value added tax (VAT, GST, etc.) versus a tax that is applied only to the price. To set up a tax to be cumulative, click **System Setup > Company Setup > Accounting Setup > Countries Serviced**. Access the country and click on the desired region.

You can now setup taxes at the **Price Book** level. If a product itself *has no explicit setting*, the product will default to these taxes. You can override the application by clicking **View Products for this Price Book**, accessing the product and specifying the tax.

Existing Price Books: If you have existing price books, you'll need to set your taxes at the price book level. Please visit your price books and set up your taxes.

Invoice Due Date Default



When you add an invoice to a project, you can now specify its due date automatically via the **Global Invoice Template**. Access **System Setup > Company Setup > Accounting Setup > Global Invoice Template**. In the new **Invoice Due Date** field, enter how many days after the invoice creation it should be set to as due.

Sales Quote Validity Date

| Sales Quote Configuration |
|---|
| Sales Quote Number [QUOTE_NUMBER] Format You can add text before and/or after the [QUOTE_NUMBER] |
| Sales Quote Valid Date 12 day(s) after today |
| |
| Language English (US) 🤤 |
| |
| 📃 Source 🛛 🖑 🛅 📸 🖓 💖 🕶 🦀 🚓 |
| B I U abe X₂ X² ≧ ≦ ≣ 1 ≒ ⊟ |
| [MYLOGO] |
| [MYCOMPANY NAME] |
| |

Similar to setting invoice due date at the template level, you can set a sales quote's expiry date. Access **System Setup > Company Setup > Accounting Setup > Sales Quote Template**. In the new **Sales Quote Valid Date** field, enter how many days after the sales quote is generated it becomes invalid.

Payment Request Notifications

We've added the ability to invoice clients for those who use a payment request/invoice process. BlueCamroo can now issue a payment request giving payment details. The client can use the payment request to pay the bill and, once paid, BlueCamroo will generate and send the client an invoice to confirm payment.

Many BlueCamroo users will be familiar with this system if they host a web site via a hosting service. You're given an email reminder to pay, similar to an invoice with line items and totals. Upon payment, the hosting service then generates an email with the "paid in full" invoice attached. Another use is, in some jurisdictions, the merchant is liable for a value-added tax upon issuance of an invoice. To ensure revenue and tax liability coincide, merchants will issue a "pro forma invoice", a kind of confirmed purchase order. The payment request can be used for these purposes.

| Extra Data Objects | | nent Request Configuration |
|------------------------------------|----------|--|
| K Accounting | Language | English (US) 😑 |
| Software Setup | | 🗏 Source 🛷 🗈 🛍 🍓 😽 🕸 🔹 🔶 🔿 |
| Supported Currencies | | |
| Tax Names | | B I U === X ₂ x ² ≧ ≦ ≣ ≣ ∐ (≣ |
| Countries Serviced | | |
| Payment Processor | | |
| Payment Methods | | |
| Products and Services | | [MYCOMPANY_NAME] |
| Price Books | | 100000000 |
| Expense Types | | [MYADDRESS] [MYCITY], [MYSTATE_PROVINCE] [MYZIP_POSTAL] |
| Expense Price Books | | |
| Global Invoice Template | | |
| Global Payment Request Template | | Bill To: |
| Global Invoice Reminders | Content | [FIRST_NAME] [LAST_NAME] |

In support of this, BlueCamroo has added a payment request template to define the payment request. Access **System Setup** > **Company Setup** > **Accounting Setup** > **Global Payment Request Template**. Define your template. If you are using it for a pro forma invoice, you will probably want to edit the template with text like "This is not a VAT invoice" to establish its nature.

| | Stage Signoff | |
|--------------------------|------------------------------|---|
| Accounting | Stage Accept | |
| | Stage Decline | |
| Q Automation | Stage Overdue | i |
| Web-to-Lead Setup | Invoice Notification | i |
| Lead Creation By Email | Payment Request Notification | i |
| Email / Message Template | Sale Quote Notification | i |
| Export Template | Sale Quote Accept | |
| Project Templates | Sale Quote Decline | |
| Workflow Rules | Forgot Password | i |
| Workflow Tasks | Suggestion Notification | i |
| Social Network Scout | Suggestion Accepted | i |
| | | |

Next, access the new Payment Request Notification email template under System Setup > Company Setup > Automation > Email / Message Template. This is the template for the actual email that will carry the payment request attachment.

When you add a new invoice to an actual product, you will see a **Payment Request Date** field. Complete the field if you wish BlueCamroo to generate a payment request and invoice. If left blank, BlueCamroo will only generate an Invoice.

| Editing Invoi | ce for P | | :t: <u>Branding</u> | Project Ab | raham Ltd |
|-------------------|--------------------|------|---------------------|--------------|-----------|
| Invoice | Produ | ıcts | Payments | Reminders | |
| Invoice Info | ormatio | n | | | |
| Invoice I | Number | DM- | 159 | | |
| Invoi | ce Date | 201 | 1-11-15 | | |
| Payment Reque | st Date | 201 | 1-11-01 | | |
| Si Invoice Ser | chedule nd Date | | | | |

Note: BlueCamroo will automatically generate a follow-on invoice only if the payment request is paid online. If you process the payments manually, you will need to click the invoice's **Send** button to issue the matching invoice.

Sending Invoices Automatically

Along with the **Payment Request Date** field, we've also added a **Schedule** checkbox to the Invoice dialog box. If checked, BlueCamroo will send the invoice automatically instead of pressing the **Send** 🖻 button next to the invoice.

Tabbed Layout to the Invoice Dialog box

| Editing Invoice | for Project: Social Networking Campaign Burton Construction | × |
|-------------------------|---|---|
| Invoice | Products Payments Reminders | |
| Invoice Inform | ation | |
| Invoice Number | DSM-164 | |
| Invoice Date | 2011-11-16 | |
| Renewal Date | \sim | |
| Schedule | | |
| Invoice Send Date | | |
| Payment Due Date | 2011-11-16 | |
| | | |
| Description | | |
| | | |
| Subtotal Total Taxes | | |
| Total Amount | | |
| | Browse | |
| Attachment | BrowseCookup | |
| | Save Close | |
| | Jave Luse | |

BlueCamroo has distributed the fields under several tabs. Some new functions have also been added.

Customized Invoice Line Items

| Invoice Products | Payments Remir | iders | | | |
|---------------------------|--------------------|------------|----------|-----------|-----------|
| Select Products to be inc | luded in this invo | ice | | | |
| Product | Quantity | Unit Price | SubTotal | Tax Total | Total |
| Big House | 1 | 400000.00 | | | CAD |
| Driveway sealing | 1 | 50.00 | 50.00 | 0.00 | 50.00 CAD |
| | | | 50.00 | 0.00 | 50.00 CAD |
| Save | | | | | |
| Shutters | 12 | 100.00 | | | Add |

Under **Products** you can now add customized line items, one time products/services that are not normally part of your defined products.

Recording Multiple Payments

| Invoice Pro | oducts Payments | Reminders | |
|--------------|-----------------|--------------|------------|
| Payment Date | Payment Amount | Payment Meth | od |
| 2011-11-16 | 10000.00 | Bank Wire | ▼ X |
| 2011-11-16 | 40000.00 | Visa | ▼ X |
| | Save | | |
| | | Cheque | ▼ Add |

Under **Payments**, BlueCamroo can now handle a payment that uses more than one payment type. For example, a customer might want to settle his/her balance using part cash and part credit card.

| 🌯 System Setup | System Setup > | Company Setup > Accou | nting Setup > Payment Metl |
|-----------------------|-------------------|-----------------------|----------------------------|
| Company Defaults | Current Payment M | lethod | |
| Company Setup | Payment Method | Name Code | |
| Users and Permissions | Cheque | cheque | X |
| | Visa | visa | X |
| Lookup Values | Master Card | master_card | x |
| Extra Fields | Bank Wire | bank_wire | X |
| 🖖 Extra Data Objects | L | Save | |
| dccounting | | | Add New Payment Method |
| Software Setup | | | Add New Payment Method |
| Supported Currencies | | | |
| Tax Names | | | |
| Countries Serviced | | | |
| Payment Processor | | | |
| Payment Methods | | | |

The **Payment Method** drop-down box is populated via a new **Payment Methods** option under **Setup**'s accounting. Select **System Setup > Company Setup > Accounting Setup > Payment Methods** to edit payment types you want to appear in this drop-down box.

Searching on Unpaid Balances

| Find Projects Where | | | Value Enter text or selected option to help narrow your search results. |
|--|---|--------------|---|
| Balance Due | - | greater than | • 0 |
| Stage: Description Stage: Start Date Stage: Estimated Completion Date Stage: Completion Date | * | | |
| Project Invoice Invoice Number Invoice Send Date Due Send Date Due Date Payment Date Balance Due | 4 | | |

We've added a *Balance Due* search criterion for **Projects**. You can use this criterion for searches, reports, and views. You can use it to search for projects that have unpaid balances.

Campaign Manager

Some new options have been added to the steps.

| HOME TASKS | EADS ACCOUNT |
|--|--|
| Campaign Manager: Campaign Dealers in Florida Set - Select Recipients) | up (Step 2 o |
| Who would you like to send this campaign to? | |
| To the saved dynamic Email List: Dealers in your area v or To the saved static Email List: All My Leads v Include unsubscribed members | Saved Dyn based on a Manager wi email the c |
| Previous Next | |

In **Step 2**, you force BlueCamroo to add customers who have unsubscribed themselves from your emailing campaigns. This features should only be used if you need to send all customers, including those who opted out, important system related messages. For example, you might want to inform all clients of down times or holiday breaks. One should use this with care and not as an option to eke out a couple extra click throughs from customers.

| Campaign Manager: Campaign Setup (Step 3 of 5 - Campaign Delivery) | | | | |
|---|------|--|--|--|
| | | | | |
| | | | | |
| Define details for event trigger | | | | |
| Newsletter Name Dealears in Florida | | | | |
| Event Trigger to use New Lead Added - | | | | |
| Send Days (Number of days after the event trigger to send the newslet | ter) | | | |
| Send Time 12:00 AM $\frac{2}{\sqrt{2}}$ | | | | |
| Type of Day Weekday - | | | | |
| Rounding condition Round Up - | | | | |
| Sort Order | | | | |
| | | | | |
| | | | | |

In **Step 3**, a triggered campaign previously could only be scheduled for a day type (weekday, weekend, etc.). You can now also enter a specific time of day the campaign should enter the mail queue.

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