

What's New in BlueCamroo?

In May BlueCamroo released a major revision of both the interface and underlying architecture. Our September release completes the process of fine tuning.

All customers who were using Version 3 are now fully migrated to Version 4.

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](#).

Explorer Bar

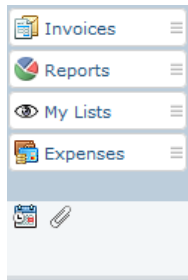
Always Available

The **Explorer Bar** is now always available. However, to maximize the work area, we've removed the button labels and display just the icons. If you hover over the icons, you will see their labels. The functionality remains the same, however. Click an **Explorer Bar** button to expand the panels.



Optional Items

At the bottom of the **Explorer Bar** is an optional menu item tray. You can drag and drop these items onto your **Explorer Bar** and add them as clickable items with the same behavior as other **Explorer Bar** items (setting up views and searches).



The current optional items are **Events** and **Attachments**.

To add the items, you need to click the **Explorer Bar Manage Menu Mode** icon (found at the top of the **Explorer Bar**). In **Manage Mode**, drag and drop one of the optional items onto the Explorer Bar. You need to drop it between two existing items. You cannot drop it at the bottom of the items. When you're done click the **Exit Manage Mode** icon to accept the changes.

When in **Manage Mode**, you can also remove **Explorer Bar** items. If, for example, you don't want **Sales Quotes** or **Invoices**, you can drag and drop them onto the tray.

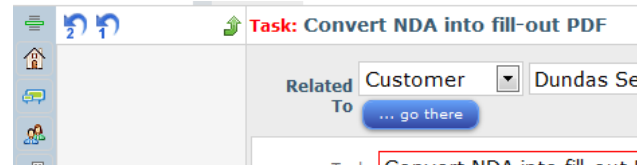
Form Fonts

Do not adjust your set. If the form fonts look bigger, it's because we're using a larger font to improve readability.

Navigation Changes

In addition to the **Explorer bar** always remaining available when you expand panels, we have made a few other changes to the way you navigate the interface.

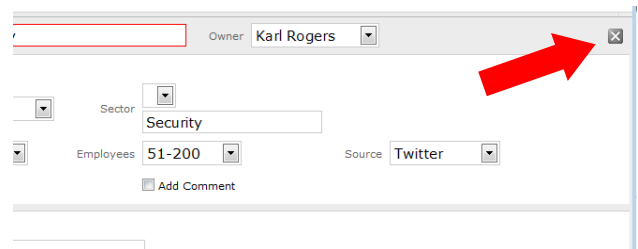
Panel Buttons



The return buttons on top of the panels have been modified. See the table below for the function:

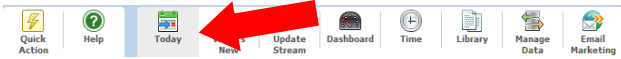
Button	Function
	Redisplay the previously opened panels
	Redisplay back two panel levels.
	Close open panels and redisplay the parent (e.g., open record).

Closing Details Panels

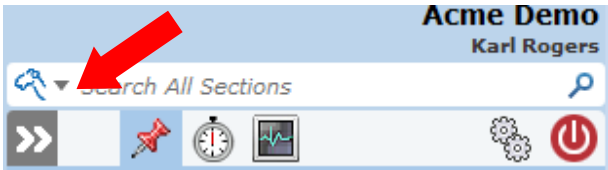


When you open a record **Details** panel, you can now close the panel with a right **Close** button.

Toolbar Changes



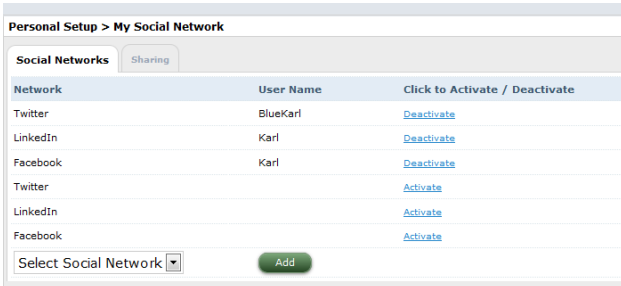
The **Today** icon has been changed and the **Quick Search** button has been removed.



Quick Search is now available as an always available search field over the **Information Panel's** toolbar. To search a specific section, click the down arrow to drop-down a list of available sections.

Social Networks

You can now add multiple social networks to your personal and company setup. In other words, if you have, say, multiple Twitter accounts or multiple Facebook accounts (say, one personal profile and one professionally facing), you can now add them by visiting your **My Social Networks** page or **System Setup's Social Networks** page.



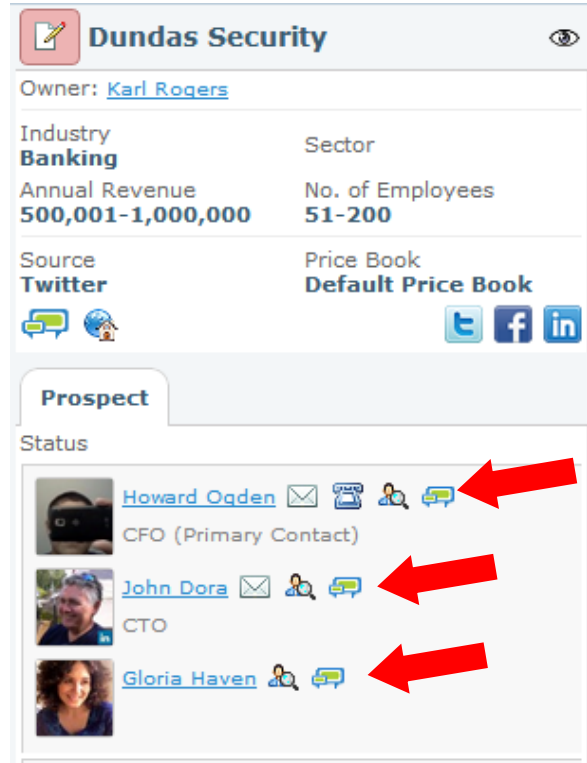
Click the **Add** button and add the additional accounts. Remember to click **Activate** and then login to the appropriate social network account.

When posting via Social Scout, these additional profiles will be available via a popup menu.

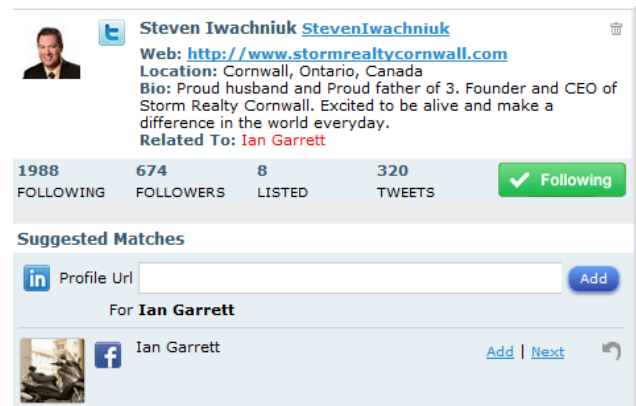
Social Network Account Matching

Person and Organization records can be associated with social networks (Twitter, LinkedIn, Facebook). Previously, you entered these social network IDs/URLs via the record's **Details** page. A record's social networks are now configured via the record's own **Social Message** page.

You can access it by clicking the record's **Social Message** icon on the **Information Panel**.



Opening the **Social Message** page, BlueCamroo will present you with possible social network account matches. You can use the match or click **Next** four times (cycling through the five most likely matches). If none of the profiles match, you can manually enter the social network ID/URL if you know it. If you close the matching and reopen, BlueCamroo will present you with five more matches.



After registering the social networks, the **Social Message** page gives you a unified feed of their social network activity.

Import

Import - Step 2 of 3

Map your fields

Load previously saved map: gmail import

Owner: Karl Rogers

Temporarily suspend workflow rules:

Organization Default Value (if input is blank)

Organization Name: Company

Description: [dropdown]

Website: [dropdown]

Annual Revenue: [dropdown]

Number of Employees: [dropdown]

Phone: Pers Phone

Fax: [dropdown]

Twitter: Twitter

LinkedIn: [dropdown]

Facebook: [dropdown]

Person

First Name: First Name

Last Name: Last Name

Title: [dropdown]

Birthdate: [dropdown]






Preferred Payment Type: [dropdown]





We've reorganized the cell mapping in Step 2 of the import. The organization makes it clearer and gives you more control where (which record type) your contact data gets imported to.




Find Location with Google Maps

Prospect

Status

 **Howard Ogden**    
CFO (Primary Contact)


 **John Dora**   
CTO

 **Gloria Haven**  

Main Location

874 Main Street
Toronto, Ontario M2N8Y2
Canada

Phone **555-222-1212**



Address fields on the **Information Panel** now feature a Google Map icon. Click the icon to open a Google Map tab with the location mapped.

Visual Project Templates and Workflow Rules

System Setup > Automation > Project Templates > Project Template Details

Social Networking Setup

- Team Members (6)**
- Stages (6)**
 - Kick Off** (Require Signoff) - Tasks (2)
 - Design** (Dependent on **Kick Off**) (Require Signoff) - Tasks (2)
 - Registration** (Dependent on **Design**) - Tasks (2)
 - Content Development** (Dependent on **Registration**) (Require Signoff) - Tasks (3)
 - Site Setup** (Dependent on **Content Development**) - Tasks (2)
 - Hand Over** (Dependent on **Site Setup**) (Require Signoff) - Tasks (2)
- Products & Services (3)**
- Invoice/Payment Request Templates**
 - Invoice Template
 - Payment Request Template
- Invoice Reminders (1)**

The setup of **Project Templates** and **Workflow Rules** has been improved with a more visual approach. The new visual screens help group options and convey the step based approach to setting up a template or workflow rule. The actual functionality is, however, unchanged.

System Setup > Automation > Workflow Rules > Workflow Rule Details

Follow up actions for new Web Form submission

Workflow Rule for object: **Lead** section: **Details**

Criteria

Launch this workflow rule if it meets the following criteria:
SOURCE equals

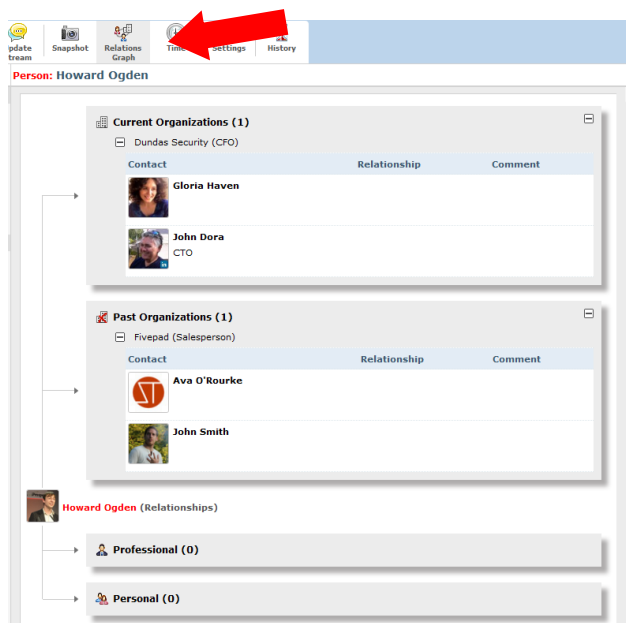
Trigger

This workflow rule will be applied:
When record is added

Actions

- Tasks**
 - Follow Up Lead
 - Prep rate card
- Emails**
 - Thank you for your Inquiry
 - New Lead Added: [NAME]

Relationship Graphs



Clicking the **Relationship Graph** icon allows you to track and visualize relationships between people entered into BlueCamroo. Relationships between **Person** records are now organized via four relationship types:

1. Current Organizations
2. Past Organizations
3. Professional Relationships (outside of any organizations)
4. Personal (friends/family)

These relationships are now visually graphed. Relationships are automatically detected if you have setup reciprocal relationship types under the **Relationship Types** lookup value (**Setup > System Setup > Lookup Values > Relationship Types**).

Use Campaign Manager for Free with Your SMTP Service

You can now use your own SMTP email server to serve BlueCamroo Campaign Manager emails. Emails sent via your own server do not count against your BlueCamroo Campaign Manager email credits.

Settings

Admin Notification Email: info@acmedemo.com

Unsubscribe Link: [Click here to \[UNSUBSCRIBELINK_BEGIN\]unsubscribe\[UNSUBSCRIBELINK_END\]](#)

Use your own SMTP Server to send campaign email

Smtp Server: smtp.acmedemo.com Port Number: 25

Smtp Username: me@acmedemo.com

Smtp Password:

To set up Campaign Manager for use with your mail server, click the **Campaign Manager** button on the **Toolbar**. Click the **Setup** button and then click the **Config** button. Check the **Use your own SMTP Server to send campaign email** checkbox and complete the SMTP setup fields. Consult with your network administrator for details if you do not know your server, username, and password. ◆

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>