BlueCamroo

User Guide v. 4.0

blue camroo

Do More with BlueCamroo

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This Guide is Version: **4.0.1**

Release Date: **June 7th, 2012**

Contents

1. Introduction

1.1 What is BlueCamroo?

BlueCamroo is a powerful and innovative all-in-one CRM (Customer Relationship Management), Project Management and Collaboration system. As a fully hosted service, requiring no more than a web browser and Internet connection to access, BlueCamroo offers businesses a single solution that includes Lead and Customer Management; Sales Pipeline Management; Online Social Network Integration; Task and Project Management; Collaboration; Support Ticketing; Time Tracking and Billing; and much, much more.

BlueCamroo's unique, patent-pending design makes it the most modern and flexible CRM solution in existence. Whereas other CRM systems reflect the 20^{th} Century (perhaps even 19^{th} Century!) workplace, where employees work for one company at a time and are simply boxes on an organization chart, BlueCamroo is built for the 21^{st} Century. In BlueCamroo, contacts you deal with can work for multiple companies at a time (and for themselves), and you can track your key contacts and their relationships over time as they move from company to company.

1.1 About this User Guide

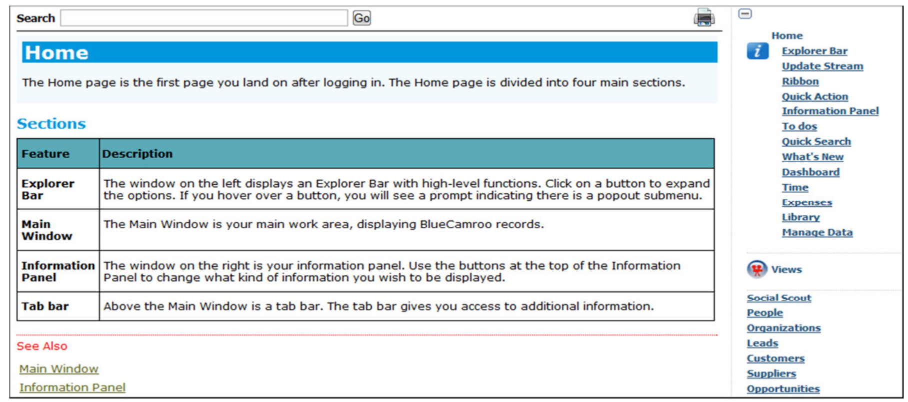
This User Guide has been created to help you get the most out of BlueCamroo. It shows you what BlueCamroo can do, and shares tips and recommendations based on our experience of setting up BlueCamroo for many different types of business, and also the experience of other users who have found innovative ways to apply BlueCamroo to work smarter in their own organizations.

This User Guide is NOT intended to be a screen-by-screen System Manual for every BlueCamroo feature. Instead, our main goal here is to give you an end-to-end understanding of how BlueCamroo "fits together" and can be used to benefit each area of your business: literally, to ***guide*** you through the system. We've written it with the following kinds of User in mind:

- Business owners and managers whose organizations use BlueCamroo, and who would like to fully understand the capabilities, operation and potential of the system.
- Anyone who is a BlueCamroo System Administrator, and especially the person who first sets up an organization's BlueCamroo Workspace.
- All BlueCamroo users who are interested in understanding more about how their day-to-day use of the system fits in to the "bigger picture".
- BlueCamroo Configuration Partners, Consultants, Advisers and Trainers who help businesses adopt and successfully implement BlueCamroo.

1.2 Other Sources of Information

In addition to this User Guide, you will find detailed help screens in each section of BlueCamroo (just click the Help button).



Further tips and help videos are available on the BlueCamroo website, and the BlueCamroo blog and forums are also rich sources of tips and more in-depth knowledge.

IMPORTANT NOTE

To keep it as short as it can be, we have designed this User Guide to be read from the front to the back. That means that in each Section we assume an understanding of the Sections that have gone before. We do cross-reference key concepts, but generally avoid repeating information.

2. Getting Started

2.1 Create your BlueCamroo Workspace

If you haven't already done so, now is a great time to create your own BlueCamroo Workspace! BlueCamroo offers a 31-Day Free Trial to enable you to explore the system before deciding if it's right for you. To create your Free Trial, visit: www.bluecamroo.com/support/home/registration.

2.2 Complete the Setup Wizards

When the System Administrator first logs in, he or she is taken through two short Wizards: one to set up basic Company information; the second to set up Personal information. All other Users see only the Personal Settings wizard when they first log in. It is a good idea to complete the Wizards, as they will set up a lot of useful templates and features automatically.

2.3 Take a Look Around

After you complete the Wizards, take a look around. The major sections of BlueCamroo are described below:

2.3.1 Home Page

The Home Page is the first page you will normally see when logging in to BlueCamroo. It includes sections for any new Tasks that have been assigned to you, current (due) tasks, undated tasks, and current calendar events.

2.3.2 Toolbar

The Toolbar runs across the top of each page, and normally contains two groups of buttons. The first group are action buttons: Quick Action, Quick Search, and Help. The remaining buttons enable you to switch between screens and functions of the system. You will notice this second group change as you navigate around the system to always present you with relevant options.

2.3.3 Quick Action.

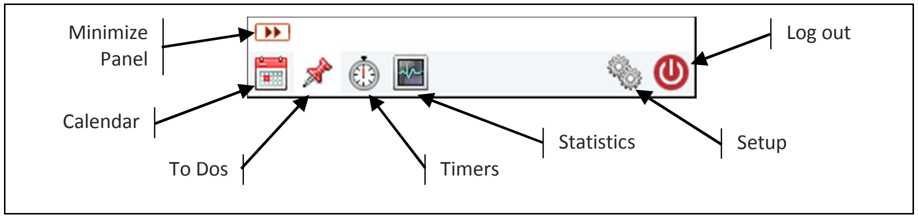
The Quick Action button is your main tool for adding data to the system, and for actions such as sending email and logging calls.

2.3.4 Explorer Bar

On the left hand side of every page, the Explorer Bar tool enables you to quickly navigate to any piece of information you require. Simply click on any item you wish to find – Customers, for example – and sub-menus will quickly guide you to your data.

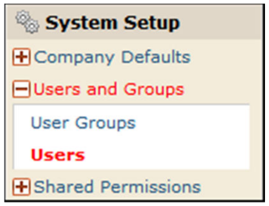
2.3.5 Right Hand Side Panels

On the right hand side of the screen, you will find a set of Panels that contain data relevant to your current view in BlueCamroo, together with additional tools. These are accessed from the Right Hand Side Panel Tab Bar.



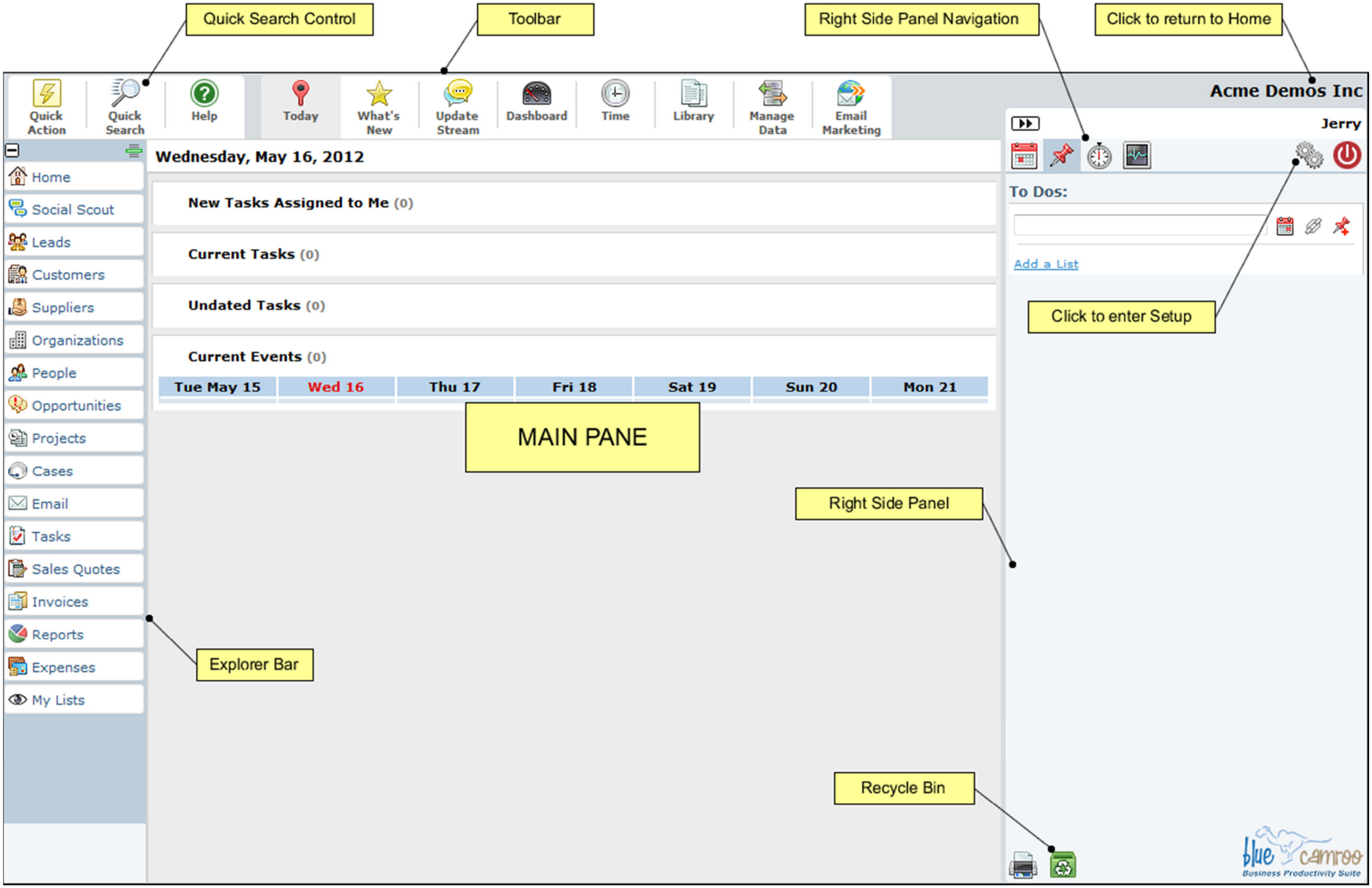
2.4 Add Colleagues

If you are the System Administrator, once you've taken a look around and got oriented, you may want to add your colleagues as system users. Here's how:



Click **Setup** **| Users and Groups | Users** to access the User Administration area.

Tip: BlueCamroo will automatically send an email to each new user that you add. To customize this email, or to turn it off entirely, click **Setup** **| Automation | Workflow Rules** and edit the **Welcome Message for Internal User** Workflow Rule.

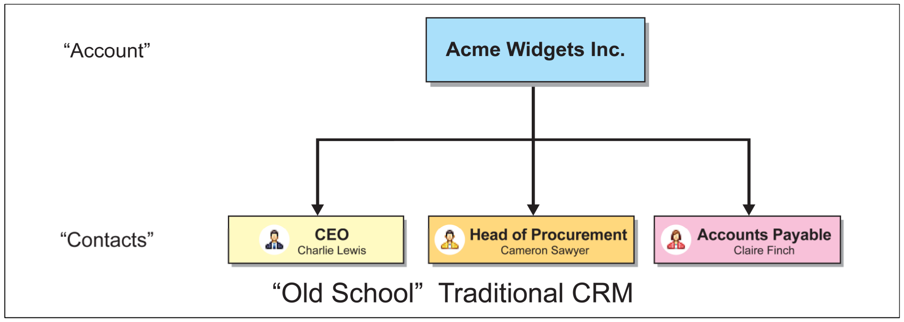


BlueCamroo – Main Sections of the Interface

3. How BlueCamroo Organizes Data

3.1 People and Organizations

If you've worked with a CRM system in the past, you've probably got used to having your data organized something like this:



This is great, at least until one of your contacts leaves the 'Account' they're connected to and moves to a different company, or until a customer comes along who's just an individual consumer so doesn't have any company to 'belong' to.

BlueCamroo does things differently. In BlueCamroo you work with **People** and **Organizations**, like this:

People, in BlueCamroo, are just like people in the real world. They can work at one company all their lives or at many companies one after another. They might be freelancers working with two or three of your customer organizations at the same time. They might consume your services as private individuals, or sub-contract their services to you, or both. They might do all these things, or none of them, at different times.

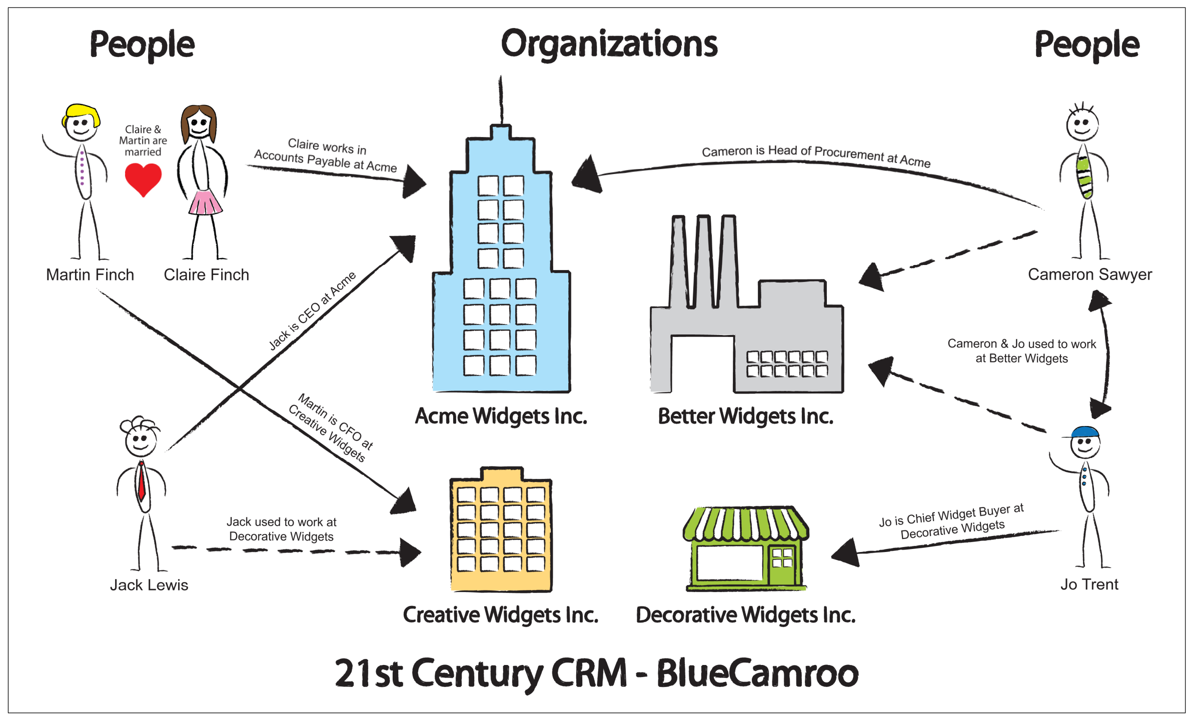
Organizations can include companies and other organizations you sell to (or hope to sell to) – i.e. customers and prospects, and also companies and other organizations you buy from – i.e. suppliers, sub-contractors, etc. But they can also include organizations you will never buy from or sell to, such as a college alumni body, for example, where you're just interested in grouping together all the People that are members of that one body.

3.2 Customers and Suppliers

Every Organization and every Person that you hold details of in BlueCamroo can be a Customer, a Supplier, both, or neither. This means that "customer-ness" and "supplier-ness" are properties of the Organization and Person data, rather than being stored as separate records.

Customers are those Organizations and People with whom you have a "selling-to" kind of relationship. Unlike traditional CRM systems, BlueCamroo doesn't insist that individuals have to belong to some kind of imaginary company Customer

Account to buy from you, so when you search in BlueCamroo for 'Customers', you'll get back a mixture of Organizations and People together.



Suppliers are those Organizations and People with whom you have a “buying-from” kind of relationship. Again, when you search in BlueCamroo for ‘Suppliers’, you’ll get back both companies and individuals who supply services to you.

3.3 “Contacts”

In traditional CRM systems, a ‘Contact’ was really just partial information about an individual who worked at an Account.

When you work with Organization data in BlueCamroo, you’ll see links to ‘Contacts’, but in the same way that Customers and Suppliers are really just aspects or states of an Organization or Person, ‘Contacts’ simply record the fact that certain **People** work with that **Organization** (for now).

3.4 Related People

Another thing about people in the real world is that they are connected to one another. So BlueCamroo also lets you record the ways in which People in your CRM system are connected – for example in the illustration on the previous page, Claire and Martin Finch, who work at Acme Widgets and Creative Widgets respectively, are married.

In many businesses, a key consideration when hiring a senior salesperson is always their network – i.e. who they’re connected to; who they know; how well they understand the community that they’re selling into. Traditional CRM systems don’t let you capture any of this insight. BlueCamroo does.

If you look back to the illustration on the previous page, you’ll see the Widget industry is a pretty small world. Not only does Claire Finch work in the Finance area at Acme Widgets, she’s married to the CFO of Creative Widgets. And Charlie Lewis, CEO of Acme Widgets (your very best customer), used to work at Decorative Widgets. That’s worth knowing when you’re trying to win your first order from Jo Trent, the new Chief Widget Buyer at Decorative Widgets!

3.5 Leads and Opportunities

Leads, in BlueCamroo, represent People and Organizations that you hope to do business with. (Some firms call these Prospects.) **Opportunities**, in contrast, are specific potential pieces of business that you are developing, whether with your Leads or your existing Customers.

Note the distinction between a Lead and an Opportunity: a Lead the Person or Organization that may become a customer in the future. An Opportunity is a specific potential deal or sale, with a predicted sale value and an expected date by when the sale will be closed.

3.6 Projects and Tasks

Projects are how you manage delivering your services to clients. A project may consist of a number of Stages (such as Design; Build; Test; Release); a number of Tasks; and a set of rules and processes for when you require client signoffs, and when and how much you invoice. (Projects are also how you generate billing from BlueCamroo.)

You can also create and manage ‘general’ projects that are just about your own internal business goals, and not related to any customer.

3.7 Cases / Support Tickets

Cases are Support or Customer Service issues that require follow-up by your team. Cases are associated to the relevant Customer, and can additionally be related to Projects, or Stages within Projects. Should you wish to do so, BlueCamroo lets you run a complete email ticketing system, right from Cases.

4. Managing the Sales Cycle

4.1 Handling Sales Leads

BlueCamroo supports the entire Sales Cycle, from first discovering a potential Lead, through Lead qualification; identifying and tracking specific Sales Opportunities; producing Sales Quotations, and ultimately progressing successful sales into Projects.

In BlueCamroo, Leads might be:

- People who fill in your web-forms
- People you meet at networking meetings
- People who email inquiries
- People you spot on Twitter or Facebook asking about services that you provide
- Tips and recommendations from existing clients
- Telemarketing Lists that you buy or rent.

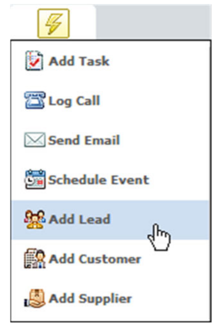
What all of these people have in common is: *you don't know very much about them!* You're going to have to research them; email them; call them. In short: find out who they are, and whether they have any potential interest in doing business with you. You're going to ***qualify*** your Leads.

But what about an existing customer, who's already bought from you three or four times, and who you know has a big new purchase requirement coming up? Isn't he a Lead? Well, of course some sales organizations would describe that as a 'sales lead', but in BlueCamroo that is an **Opportunity**. Here's the distinction:

A Lead:	***An Opportunity:***
A person or organization you have become aware of. May be valuable or not. Needs to be QUALIFIED.	A specific potential purchase requirement for your products or services.

Of course, a **Lead** may have one or more specific **Opportunities** that you wish to track, just the same as an existing customer.

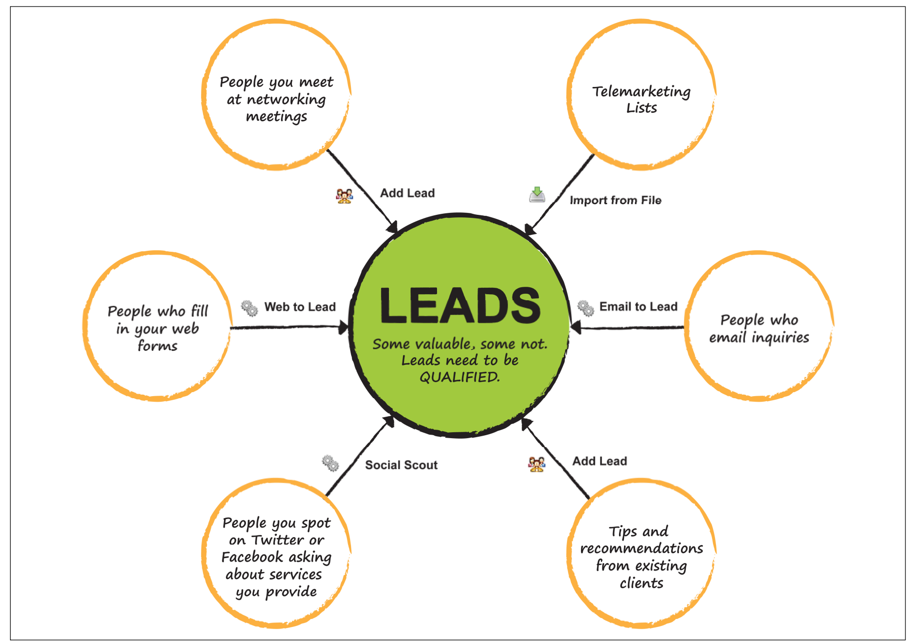
4.1.1 Capturing Leads



To work with your Leads, you'll need to get their details into BlueCamroo. If you're dealing with one-off Leads, such as the person whose business card you picked up at a networking breakfast, or the recommendation from an existing client, you'll be entering their details manually at your keyboard.

Simply drop-down the Quick Action button from the Toolbar and pick **Add Lead**.

Often, however, BlueCamroo can provide automated processes to capture Leads:



Web To Lead Forms

BlueCamroo lets you easily build Web To Lead Forms that you can add to your website, blog, etc. When a visitor to your website completes the form, a new Lead will be created in BlueCamroo, with all their information. (For Web to Lead setup, go to **Setup | Automation | Web-to-Lead**.)

Email To Lead

Often, the first contact you have with a Lead is when they have come across details of your business, and have sent an email to your general contact email address, such as "sales@mycompany.com", or "info@mycompany.com".

BlueCamroo allows you to configure special **Email To Lead** email addresses which, when an email is received, can process it automatically to generate a new Lead. For example, if your business defines "sales@mycompany.bluecamroo.com" as an Email To Lead address, then every email received at that address from a completely new contact to your organization will automatically create a new Lead.

> ***Email to Lead – All the facts!***
>
> The Email to Lead process is actually even more powerful than this. Here's what it does with each new email it receives:
>
> 1. Check if the 'from' email address is already in the system. If not, create a new Lead, and attach the email to it.
> 2. If the email already exists as a Lead, attach the new email to the existing Lead.
> 3. If the email already exists as a **Contact** at an existing **Organization**, attach the new email to the existing Contact.
> 4. If the email does not exist in the system, but the domain is recognized as belonging to a Contact on an existing Organization – e.g. an email is received from "john**@mycompany.com**", who is not know in the system, but there *is* a "david**@mycompany.com**" – then a new Contact will be created for the same Organization, and the email attached to it.

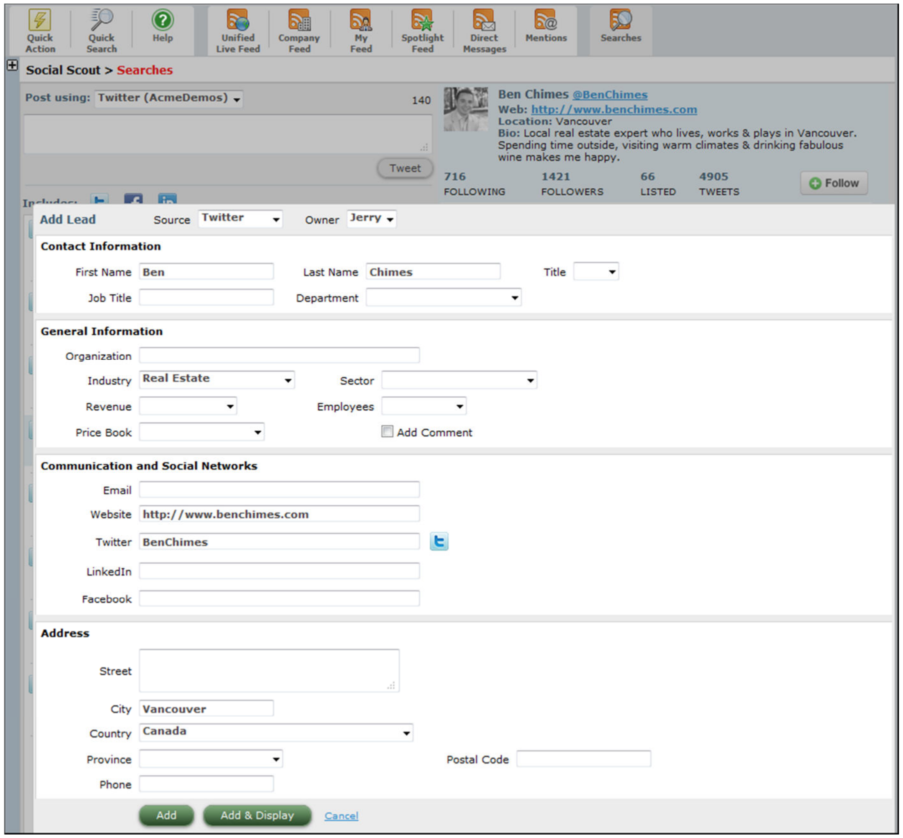
The default **Email to Lead** address is 'sales@[yourdomain].bluecamroo.com'. You can configure additional addresses at **Setup | Automation | Lead Creation by Email.**

Tip: You can forward any email you have received to your valid Email To Lead address(es) to add it to BlueCamroo as a Lead, but it is even better if you can redirect selected addresses on your company email system so they point directly to BlueCamroo. For example, you might point "info@mycompany.com" to "info@mycompany.bluecamroo.com". (Talk to whomever controls your email system if you need help setting this up.)

Social Scout

Social Scout (see Section 5) is BlueCamroo's Social Network Monitoring module, built right in to your BlueCamroo system. Amongst other features, the Social Scout enables you to define Searches that can be a great source of new Leads.

When you identify a Lead within the Social Scout that you feel may be worth following up on, you can click to add it directly to your BlueCamroo Leads.



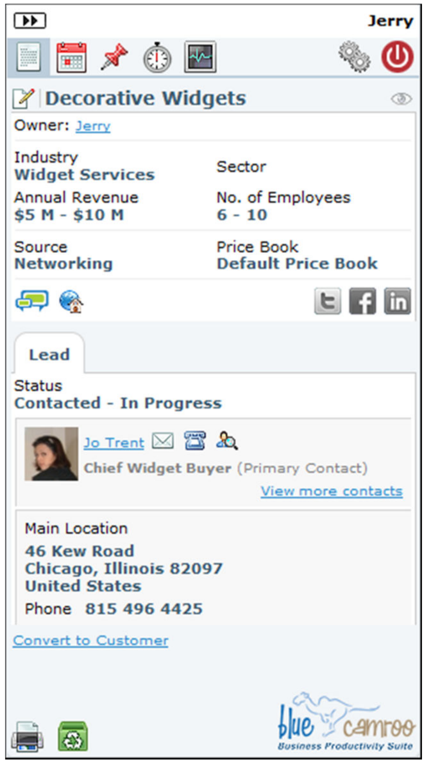
Import from File

If you have Lead data in other systems, or in data files that you have purchased, you can import the information directly into BlueCamroo. Full details of how to import data is provided in Appendix 2.

Note: Only System Administrators have access to the Import feature.

4.1.2 Qualifying Leads

As mentioned above, Leads are details of people and organizations that you don't know a great deal about. A Lead may be a potential customer, or it may just be a random connection that's really not right for your business. That's why the first action you, or your sales team, need to take is to ***Qualify*** each Sales Lead.

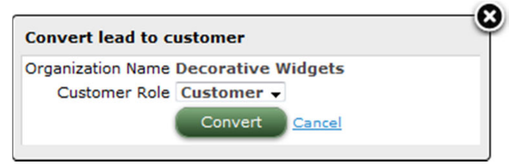


How you Qualify your Leads is up to you. In some businesses, it can mean picking up the phone and arranging a meeting; in others it might involve desk research to 'score' the Lead. Whatever method you use to Qualify your Leads, BlueCamroo enables you to keep and share a record of all the Calls you make and receive; Tasks; Meetings; and the Emails and Documents related to the Lead.

From your sales follow-up, you will eventually decide that some leads ***Qualify-In*** and progress as prospective or actual Customers (see below); others will ***Qualify-Out*** and be set aside.

4.1.3 Converting Leads into Customers

To Convert a Lead, simply click the **Convert to Customer** link from the right hand panel.



All the Lead History that you have built up is retained and attached to the Organization when you Convert your Lead.

Tip: Some BlueCamroo users like to convert Leads to Customer status only when they receive their first order; others like to convert Leads to a 'Prospective Customer' after the Lead is qualified. Neither way is better than the other: you can do everything with a Lead that you can do with a Customer, other than associating Projects and raising Invoices.

4.2 Working with Customers

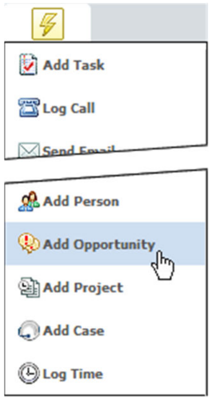
In BlueCamroo, a 'Customer' can be any Organization or Person (i.e. individual consumer) with whom you have a 'selling-to' kind of relationship. You can define as many different types of Customer as you choose, so if you want to distinguish 'Key Accounts' from other customers, for example, you (or your System Administrator) can go ahead and do that. Your list of Customer Types is managed in setup: **Setup | Lookup Values | Customer Types.**

If a particular Customer is an **Organization**, the People who work at that Organization can be connected to it as **Contacts**. Remember, however, that in this case it is the Organization that is the Customer, not the Person. A Person is only a Customer if they are buying from you in their own right.

4.3 Managing Sales Opportunities

A few pages back, we drew attention to the difference between Leads and Opportunities. To recap: a **Lead** is a person / organization that may or may not have some need for your products or services, and needs to be qualified to determine whether you want to invest more sales effort in developing the relationship; an **Opportunity** is a specific piece of potential business with a Lead or existing Customer, usually with an estimated value and time horizon to close.

4.3.1 Creating Opportunities



To add an Opportunity to BlueCamroo, drop down the Quick Action button and select **Add Opportunity**.

Be sure when you add the Opportunity to input your best estimate of the value of the potential Sale, and also the date by which you expect the Opportunity to be closed (i.e. the sale to be made).

4.3.2 Adding Information about a Sales Opportunity

Just as you do with Leads, Organizations and Contacts, BlueCamroo allows you to attach Emails, Tasks, Files, etc to your Opportunity. However, on the Toolbar in any Opportunity you'll find a number of additional types of data that you can add:

Settings

The Settings button contains three options:

Contact Roles

For larger sales opportunities, there are frequently multiple decision-makers within the client organization. Contact Roles allow you to build up a picture of who is involved in the sale from the client perspective, and what role they play.

Team Members

Who from your team will be involved in delivering your product or service?

Shares

If your workspace is set up to manage permissions at the individual opportunity level (rather than one setting for all opportunities), this lets you control who has access to the opportunity. (See Appendix 1 – Managing Users and Permissions for further explanation of Shares.)

Products and Sales Quotes

What **Products and Services** make up the Sale that you are proposing? (Note: If you add Products, the estimated Opportunity Value will be updated accordingly.)

As the name suggests, the ***Products and Sales Quotes*** area also includes the facility to send out a Sales Quotation directly from BlueCamroo. This quotation will be sent as an email attachment, and your customer will have the option to accept or provide feedback on the Quotation online.

For further information on setting up and using Sales Quotations, please see Section 11.

4.3.3 Reporting Sales Pipeline

BlueCamroo makes it easy for you to build your own reports on your data (see Section 15). For reporting Sales Pipeline, however, there is a special pre-defined report that you can use.

To access this report, select **Reports** from the left hand Explorer Bar, then **Pre-Defined Reports** and **Sales Opportunity Tracking**.

Pipeline Valuation

Stage	# Opportunities			Opportunity Weighted Value			Opportunity Values		
	Start	Change	End	Start	Change	End	Start	Change	End
Exploration	0	1	1	0.00	300.00	300.00	0.00	3,000.00	3,000.00
Quotation	2	-1	1	4,830.00	-2,280.00	2,550.00	16,100.00	-7,600.00	8,500.00
Total Pipeline Value	**2**	**0**	**2**	**4,830.00**	**-1,980.00**	**2,850.00**	**16,100.00**	**-4,600.00**	**11,500.00**
Won - Estimated Value			1						7,600.00
Won - Actual Value									7,000.00
Other Sales									2,200.00
Total Sales (Actual)									9,200.00

Pipeline Details

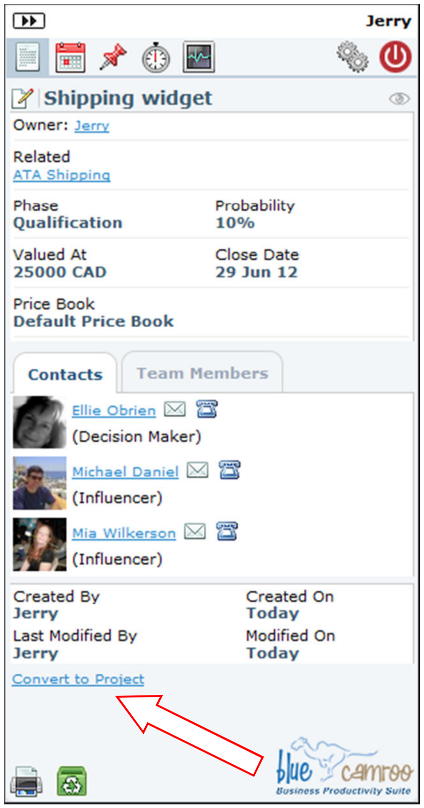
Phase	Opportunity Name	Account Name	Phase	Probability	Estimated Close Date	Valued At	Weighted Value
Exploration	Web Design	Daily Bugle	Exploration	10%	31 May 12	3,000.00	300.00
Exploration	Annual Report Design + Print	Evil Petting Zoos Inc	Quotation	30%	15 Jun 12	8,500.00	2,550.00

Export report to pdf

4.4 Completing the Sales Cycle

You've closed the sale. Congratulations!

In BlueCamroo, you manage delivering, billing and receiving payment for your products and services via **Projects**, so go ahead now and ***convert*** your Opportunity into a Project.



Just as when you converted a Lead into a Customer, converting Opportunities into Projects retains all the Opportunity history, so any emails, sales quotations or attachments will move across to the new Project.

See Section 8 to learn about Creating and Managing Projects.

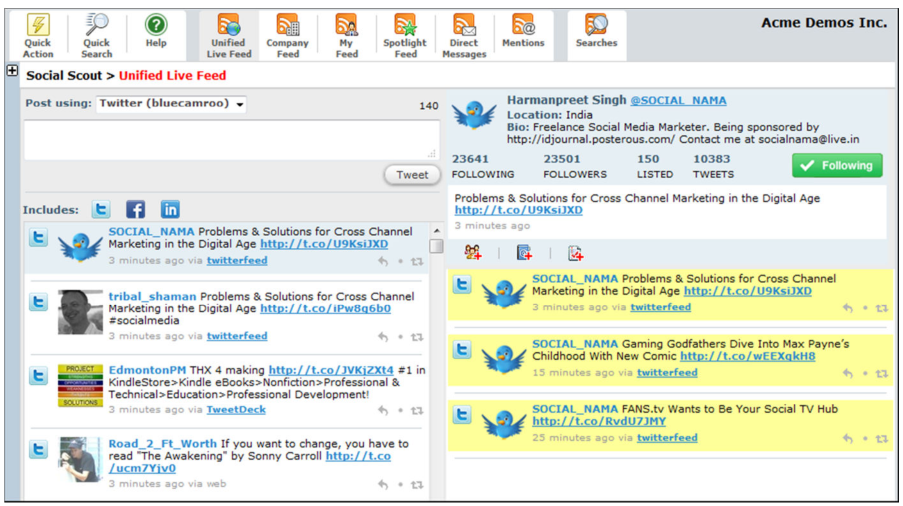
5. Getting Social

5.1 The Social Scout

BlueCamroo makes it possible to tap in to three of the most popular online Social Networks – Twitter, Facebook and LinkedIn – to send and receive messages and to seek out sales opportunities, service issues and market "buzz". The main Social Network capabilities are located in the Social Scout module, which is accessed by selecting the **Social Scout** option from the Explorer Bar.

Unified Live Feed

The default view in the Social Scout is the Unified Live Feed. This shows updates from anyone you follow on Twitter; from your Facebook friends; and from your LinkedIn contacts. If Social Scout is configured with both your Company's and your personal social network account details, you will see updates from all accounts. (If others in your organization have also configured Social Scout with their individual account details, and have shared their Social access with you, their results will be shown too. See Page 12 for information about setting up and sharing personal Social Accounts.)



Filtering the Feed

The Toolbar provides options to filter the Unified Feed down to just Company Account; Personal Account; Direct Messages (Twitter) and Mentions (Twitter). Additionally, the Spotlight Feed focuses in only on updates from People and Organizations that exist within your BlueCamroo system.

Using the Includes: group of buttons, you can also Toggle-Off / Toggle-On Twitter, Facebook and LinkedIn from your results.

Taking Action

New messages and updates appear in the left hand side of the screen. You can click the icons to Reply, Retweet or Direct Message via Twitter, or the action links to **Like** or **Comment** via Facebook or LinkedIn, and to **Send Message** via LinkedIn.

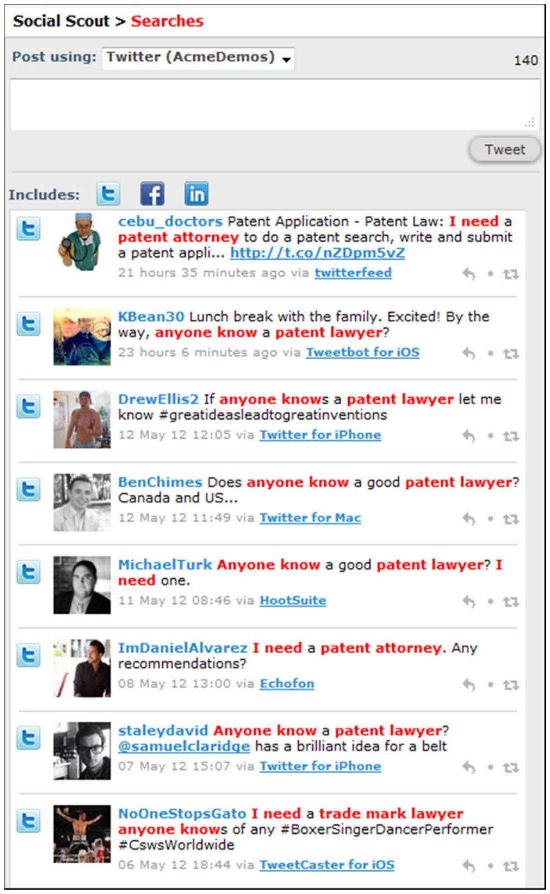
Clicking on the thumbnail brings the message and the poster into focus on the right hand side of the display, where you have additional options to save the person as a Lead, Customer, or to create a Task to follow-up. If the person whose message you are focusing on is already in your BlueCamroo workspace, you will have the option to Save the Message to their record.

Social Search Channels

In addition to keeping up with those you follow, friend or link to, the Social Scout allows you to monitor Twitter and public Facebook updates for sales opportunities, service issues, and market "buzz".

The screenshot on the following page shows results from a **Sales Opportunity Search** that a legal firm might use to locate people who need advice with patents and trade marks. As with listings in the Unified Feed, each result can be brought into focus in the right-hand side panel, to view extended information about the poster, and to create new Leads and Tasks within your BlueCamroo database. If any Sales Opportunity looks worth following up, you can Tweet a response instantly, straight from BlueCamroo.

Of course, you can search social updates with many other tools, but here's what's special about using BlueCamroo:



1. You can create Searches that combine **Keywords** with **Filters**. In this example, we've combined Keywords such as *patent attorney* and *trade mark lawyer* with Filters such as *I need* and *what's the best?* Using Filters in this way focuses in on "buying signals", and greatly increases the proportion of your results that are worth following-up.

2. Social Scout is integrated into your CRM Database, so you can directly create Leads and record your communi-cations, just like with any other Lead Source.

3. You can narrow your searches by Language and Location to get just the results you want.

Social Scout Setup - Administrator

To configure the Social Scout with your Company social IDs, click **Setup** **| Social Scout** | **Social Networks**. (Note that the Social Scout uses your Company social accounts to perform searches, so these must be set up to activate the Search Channels.)

Also at **Setup** **| Social Scout,** four **Social Search Channels** are available to set up, as follows:

Sales Opportunities

Combines "Opportunity" keywords (typically the category of product you sell, or the need your service satisfies) with "Buying Signal" filters like "I want"; "We need" and "Can you recommend". Only tweets that match at least 1 Keyword AND at least one Filter are selected. Both key-words and filters can be customized to optimize your results.

Buzz

Similar to Sales Opportunity search, but combines "Domain interest" keywords (your industry; particular brands; etc) with "Buzz" filters – emotive terms such as "rocks"; "sucks"; "best"; "worst" "fail", etc. Great for picking up on the mood in your sector. Again, use your choice of Keywords and Filters.

Client Support

This channel helps you identify and respond to customer issues. Keywords should be specific to your business – such as your brand and product names. Filters reflect language that customers may use when they have an issue, such as "problem with"; "need help"; etc. Note that results matched on the Client Support channel also provide the opportunity to directly Add a Case for follow-up.

General

Unlike the first three Channels, the General channel has no Filters, allowing you to capture the broadest range of updates that match your chosen keywords.

Finally, there is also the option to configure **Locations**, for use in Social Searches.

Social Scout Setup - User

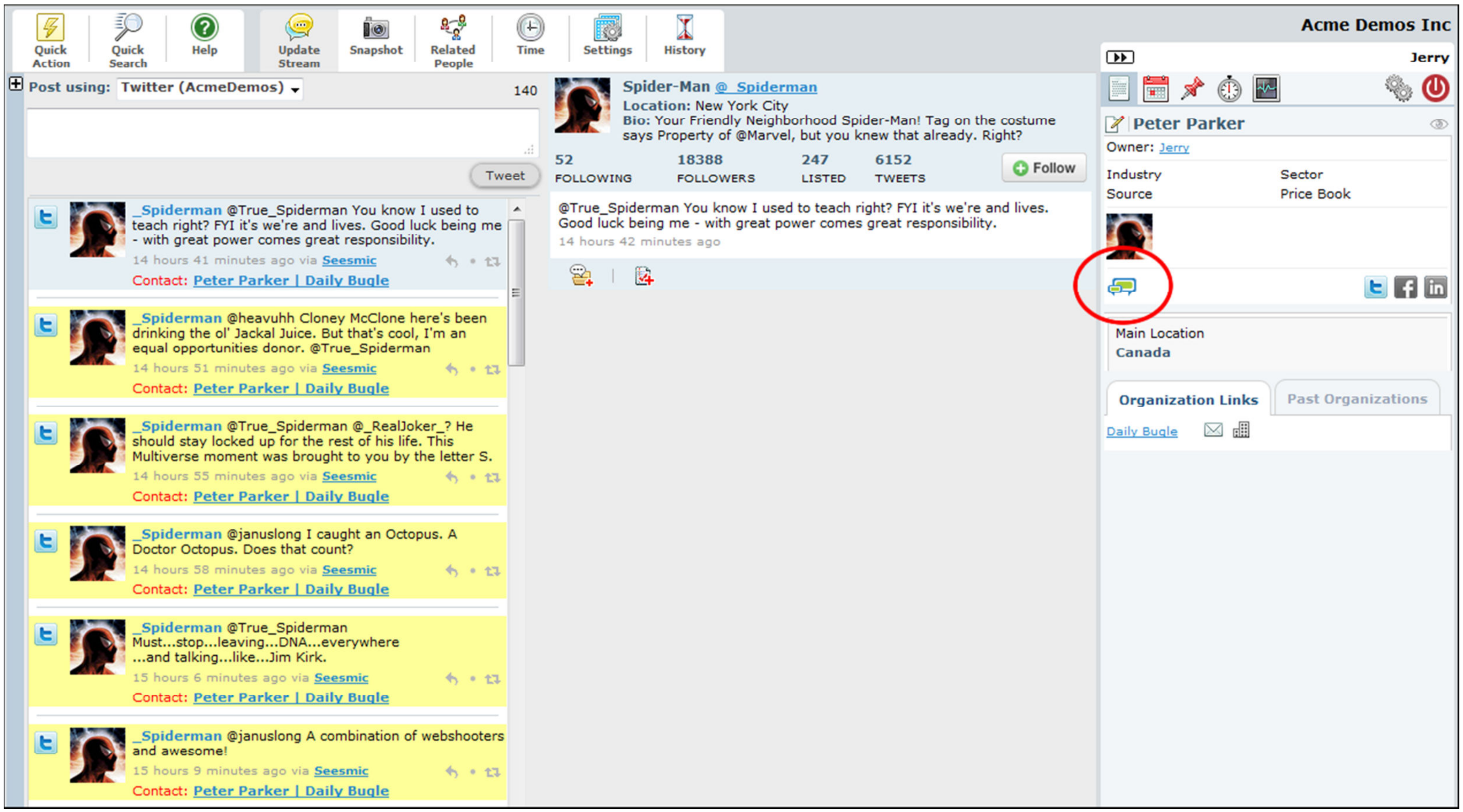
Depending upon their Permissions, individual Users may view the Unified Feed and Search Channels using the Company's social IDs, and may also post on behalf of the Company. Additionally, Users may input details of their personal social accounts, to work with their personal results alongside the Company results.

To configure personal Social IDs, click **Setup** | **My Social Networks**. Note that each User controls via the **Sharing** tab which (if any) other Users may work with their social accounts.

5.2 Lead and Contact Social Feeds

Another key benefit of connecting your BlueCamroo workspace to your social media accounts is the ability to view your contacts' social streams directly within their individual record. By ensuring you enter Twitter, Facebook and LinkedIn IDs for each contact, you will have access to their latest updates by simply clicking the Social Scout button in the right panel of any record.

Moreover, any social updates you Save are then held and available by selecting **Social Messages** from the record's left hand Explorer Bar options.



6. Managing Tasks

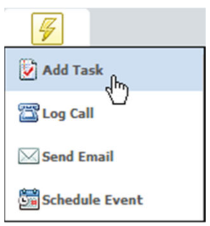
6.1 "Accountability Management"

Many project management and collaboration systems incorporate some form of Task Management. Frequently, this involves creating a Task for other users, and using the system to notify the assigned user that they have a task to complete by a certain date and time.

This is a good process, but it has one important flaw – when you've assigned a task to another user, ***how can you be sure they are actually got the notification and are going to do what you've asked?***

BlueCamroo goes beyond the basics of Task Management and implements a scheme of **Accountability Management**, by requiring the assigned user to ***Accept*** or ***Reject*** each assigned task. This closes the communication loop, so that rather than leaving you uncertain your request has been received and will be actioned, BlueCamroo lets you see that whomever you assigned your task to has received the task notification; and has ***Accepted*** it, confirming that he or she is taking ***Accountability*** to complete the task.

6.2 Creating and Assigning Tasks



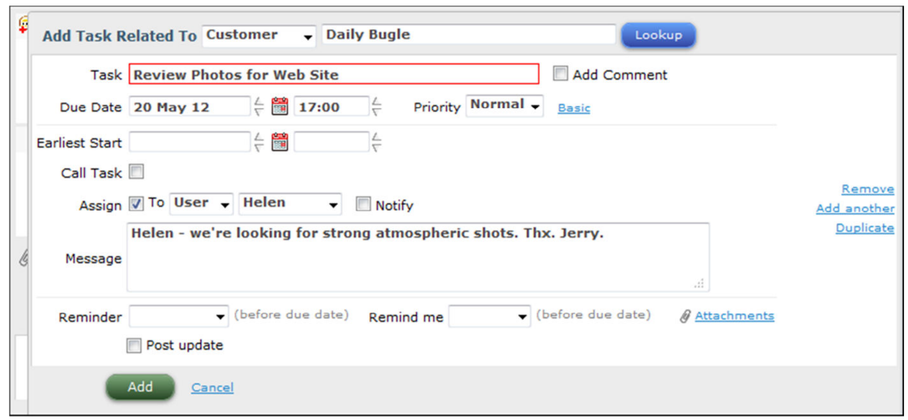
To create a Task from anywhere in BlueCamroo, drop down the Quick Action button and pick '**Add Task**'.

Alternatively, when working with any BlueCamroo data, hover over 'Tasks' in the Explorer Bar and click the Add button to add tasks related to that particular data.

You can assign the task to yourself, or to any ***one*** other person (because only one person can be accountable for delivery of a task). The exception to this is if you (or your System Administrator) have defined **Task Groups**, in which case you will be able to assign the Task to a group of colleagues, any one of whom may accept responsibility for delivery. (See Section 6.6 below for more information about Group Tasks.)

Here are some tips for creating and assigning Tasks:

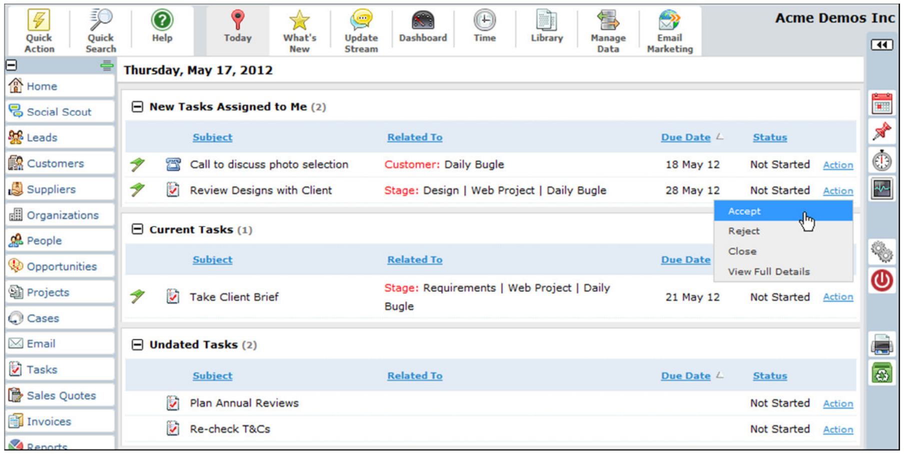
- If the Task you are assigning is to make a call, select the 'Call' task type to access additional data.
- The Task will automatically appear in the Assignee's ***New Tasks Assigned to Me*** list. Check the 'Notify' box to also notify them by Email.
- Due Date is the date by which the Task should be completed. You'll probably complete this for most tasks.
- Earliest Start Date is the date before which no work should be done on the task. This is normally left blank, but you might use it if, for example, the task is to make a follow-up call and you don't want that done too soon.



6.3 Accepting (or Rejecting) Assigned Tasks

Every time you log in to BlueCamroo, new Task Assignments (tasks other people have assigned to you) are right there on your Home page.

It is a good idea to make a practice of logging in to BlueCamroo at least once a day to check the status of your tasks. For every newly assigned task, the system requires you to either **Accept** or **Reject** the task. Simply mouse-over the **Action** link to activate the drop-down menu, and select the appropriate action.



As the screenshot above shows, there are also two further options: to **Close** (i.e. complete) the task, or **View Full Details**. The **Close** option lets you complete a task right then and there without needing to go through the step of Accepting it; this can be particularly helpful if you're just updating BlueCamroo with tasks you've already completed, for example because you did them as soon as you got the notification email.

Note: System Administrators will see additional Actions available.

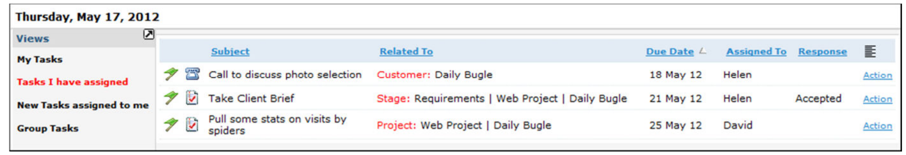
6.4 Viewing Tasks

OK. So you've Assigned a Task to me, and I've Accepted it. How are you going to know?

Click the **Tasks** button in the Explorer Bar. BlueCamroo will now display four options:

1. **My Tasks**: Open Tasks I have created for myself, or Accepted from other users
2. **Tasks I have assigned**: Open Tasks I've created for other users
3. **New Tasks assigned to me**: New Tasks from other users
4. **Group Tasks**: Tasks for Groups that I am a member of (see Section 6.6)

By selecting **Tasks I have assigned**, you can see all open tasks that you have assigned to other users, and whether or not they are Accepted.



6.5 Working with Tasks

Most BlueCamroo users quickly find they're managing a lot of their day-to-day work by creating and working with Tasks, so it's worth taking a moment to run through the options available to you to work with Tasks. Depending upon the context, the **Action** link will present a number of options, including:

Accept and **Reject**	To Accept or Reject tasks assigned to you by another user.
Add Progress	Record some progress on a task (and optionally record time spent to your BlueCamroo Time Sheet) short of completing it.
Log a Call	Special action for **Call** type tasks. Launches a dedicated screen for making / logging calls.
Close	Record completion of the task (and optionally record time spent to your BlueCamroo Time Sheet).
Cancel	Cancel the task (without completing it)
Reschedule	Change the due date on the task. All changes are recorded to Task History and – for tasks assigned by another user – are notified back to the assignor.
Re-Assign	Give the task to someone else. Note this uses the same process as assigning a new task to another user; they will be asked to Accept or Reject the task, and re-assignment is only completed if they Accept. (If the task was assigned to you by another user, you will still show as the accountable user until the person you are trying to re-assign to accepts.)
Add Timer	Starts a Timer (see Section 12.4) associated to this task.

6.6 Group Tasks

A basic principle in BlueCamroo is that only ***one*** person can be accountable for completion of each task. However, it’s not unusual in organizations to find people working in Groups that share tasks amongst themselves. BlueCamroo addresses this with **Group Tasks**.

Note: *Group Tasks can only be used where your System Administrator has set up at least one* ***Task Group****. Instructions for the System Administrator are below.*

Let’s assume for a moment that Peter, Sarah and George are members of the ***Sales Support Group***, and that you are a Sales Manager who needs to have a quotation sent out. Now you could choose and assign a Task to Peter, or to Sarah, or to George individually to issue the sales quotation, but perhaps in reality you don’t mind which person issues the quotation so long as it gets sent. In this case, you can create your Task in the normal way and assign it to the Sales Support Group.

How are Group Tasks Different for the Assignee?

Group Tasks are handled pretty much like regular Tasks, with these exceptions:

- A new Group Task appears in *every* Group member’s **New Tasks Assigned to Me** list.
- When a member of the Group accepts the Task, they become the accountable person to complete it, and it moves into their individual **My Tasks** list. At the same time, the Task now *disappears* from every other Group member’s New Task Assignments list.
- All Group members can see all Open tasks that have been accepted by any member of the Group by going to the **Tasks** page and selecting the **Group Tasks** view.
- All Group members can **Add Progress** to, or **Close** any Group Task, even if it has been Accepted by a different member.

How are Group Tasks Different for the Assignor?

For the person who creates and assigns a Group Task, there’s really very little difference. You can still view the Task in the normal way in the **Tasks I have assigned** view on the Tasks page, and BlueCamroo will still tell you if it has been accepted or not. The only difference is that BlueCamroo will also tell you which member of the Group accepted the Task.

For Administrators: Creating Task Groups

If you are the System Administrator, follow these steps to configure Task Groups: Click **Setup | Users and Groups | User Groups**; add a new User Group (or edit an existing one), and check the ‘Task Group’ checkbox to indicate this Group should be used for Group Tasks.

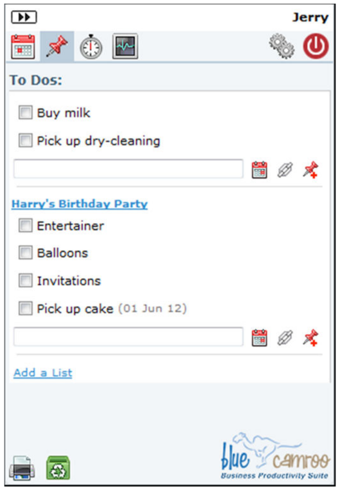
6.7 To Dos

So, to recap, you can create BlueCamroo Tasks for yourself and co-workers. You can Assign; Schedule; Re-assign; Re-schedule; Add Progress; and Launch Timers.

> *“What’s that? You just wanted to remember to buy some milk and pick up your dry-cleaning at lunchtime?”*

We all have lists of stuff we need to do that doesn’t warrant creating a full-on Task in BlueCamroo. And for those, BlueCamroo offers **To Do lists**.

To Do Lists are created in the **To Dos** right-hand side panel.



3 Ways that To Dos are not the same as Tasks:

1. To Dos cannot be assigned to anyone else.
2. To Dos are ‘done’ or ‘not done’. You can’t add progress to a To Do.
3. To Dos are personal. Other system users (including the System Admin) don’t see your To Dos, and they also don’t create History.

2 Ways that To Dos are a bit like Tasks:

1. To Dos can have due dates.
2. To Dos can be related to other data.

7. All About Email

7.1 Overview

A huge part of our communication with clients today is via Email. BlueCamroo provides a number of ways you can send, receive and store relevant emails, and associate these to the appropriate base data objects – e.g. the Organization, Opportunity, Task or Case, etc. to which they relate.

It is important to appreciate that whilst you can – and surely will – send emails directly from the system, BlueCamroo is not intended to replace your primary email tool – your Microsoft Outlook client, or Gmail, for example. Instead, it is designed to run alongside your primary email service, as a place where you can store and file the relevant items that are important to long-term client history.

For the purpose of this section, let's say my name is "Jerry", and my email address is "***jerry@acmedemos.com***".

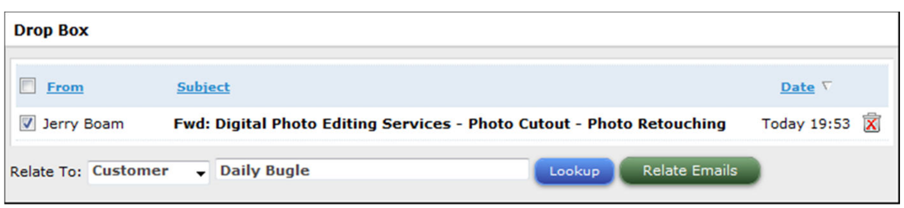
My company's BlueCamroo workspace is at ***http://acmedemos.bluecamroo.com***, and I log in to BlueCamroo using my normal company email address.

7.2 The Drop Box

The BlueCamroo Drop Box is the quickest method of getting a copy of some important email into BlueCamroo. Every BlueCamroo Workspace has a Drop Box Email Address, which is:

email@[your-domain].bluecamroo.com

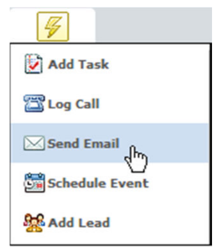
So, in my example here, I will take an email I have received and send it to: ***email@acmedemos.bluecamroo.com***. Straight away, BlueCamroo recognizes that the email is from me, and inserts it in my Drop Box, ready for filing. (Choose **Email** from the Explorer Bar to access your Drop Box.)



Note that you are not restricted to forwarding emails you have received outside of BlueCamroo. You can also Blind Copy (bcc) emails that you send to clients into your Drop Box email address.

Important: You may be wondering how BlueCamroo knows how to place the emails into **my** Drop Box, and not one of my colleagues'. Simply, BlueCamroo checks the sender email address (i.e. me, in this case); matches it against the Users in my workspace, and places the email in the correct user's Drop Box. An important consequence of this, however, is that you must ensure you send to the Drop Box email address only from an email address that you have entered in BlueCamroo. (Go to **Setup** and select **Personal Information** to check or add to your list of email addresses.)

7.3 Sending and Receiving Emails



You can send an email from BlueCamroo at any time. Simply drop down the Quick Action button from the Toolbar and select 'Send Email'.

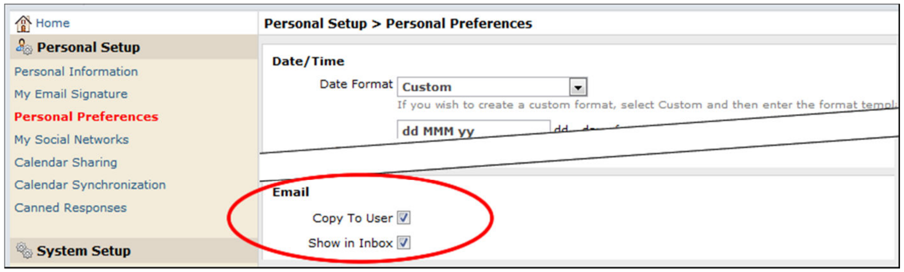
Alternatively, when working with any Bluecamroo data, hover over 'Emails' in the Explorer Bar and click the Add button to add emails related to that particular data.

Emails are sent 'from' your Primary Email Address (the address you use to log in to BlueCamroo). But what happens when the recipient responds? In this case rather than responding back to your standard email system, the response will be directed back to BlueCamroo where it is associated with the same data item that your original email was associated to.

By default, BlueCamroo does two further things with email responses that it receives:

- It places a copy of the email in your **Unread Email** folder (accessed from the **Email** button on the Explorer Bar).
- It forwards a copy to your regular, external email account, so that you have a copy in BlueCamroo, **and** a copy in your normal Outlook, Gmail, etc.

You can override these default actions by changing your personal settings at **Setup** | **Personal Preferences**.



Note: When BlueCamroo copies the response to your external email, if you ***reply*** back then ***your*** response will be added to BlueCamroo, and copied to the original recipient of your first email.

7.4 Special Email Addresses

We've already met the first of BlueCamroo's special email addresses – the Drop Box address, which is always email@[your-domain].bluecamroo.com – but there are others. Here's the full list:

Email Address	BlueCamroo Action
email @[your-domain].bluecamroo.com	Email is placed in the Drop Box for review and filing.
task @[your-domain].bluecamroo.com	A Task is created, using the email subject line as the Task Subject, and the email body as Task Description. Note that tasks created in this way are assigned to the sender of the email. If applicable, they can subsequently be reassigned through BlueCamroo. If the email has attachments, these will be associated to the task.
todo @[your-domain].bluecamroo.com	A To Do is created, using the email subject line as the To Do Subject. Any content in the email body is discarded.
support @[your-domain].bluecamroo.com	If the sender email address is recognized by BlueCamroo, a Case will be created, using the email subject line as the Case Subject, and the email body as the Case Detail. The Case will be associated to the relevant Person or the Organization in which the Contact exits. If the sender is not recognized, the Email will 'pass through' BlueCamroo to the default Case recipient. Initially, this will be the person in your organization who created your BlueCamroo workspace. (If you are a System Administrator in your Workspace, you can change the default Support Email Recipient by going to **Setup** | **Company Defaults** | **Company Details**.)
sales @[your-domain].bluecamroo.com	'sales@' is your default Email-to-Lead address; you can add more (**Setup** | **Automation** | **Lead Creation by Email**). When BlueCamroo receives an email to your 'sales@' email address, it does the following: • Check if the 'from' email address is already in the system. If not, create a new Lead, and attach the email to it. • If the email already exists as a Lead, attach the new email to the existing Lead. • If the email already exists as a **Contact** on an existing **Organization**, attach the new email to the existing Contact. • If the email does not exist in the system, but the domain is recognized as belonging to a Contact on an existing Organization – e.g. an email is received from "john**@somecompany.com**", who is not known in the system, but there *is* a "david**@somecompany.com**" – then a new Contact will be created for the same Organization, and the email attached to it.

8. Creating and Managing Projects

8.1 This Section is about… Project Management

If you're managing your complete Sales Cycle through BlueCamroo, the 'sales' part – finding and winning the business – is tracked from **Leads** through **Customers** and **Opportunities**, as described in Section 4 above. Everything ***after*** you close the sale is handled via **Projects** and **Cases** (see Section 10).

Depending on the kind of business you operate, you may use Projects simply to create "orders", enabling you to generate invoices and receive payment through BlueCamroo. If that's all you need, you'll find full details in Section 11 – Quoting, Billing and Receiving Payment. ***This*** section is about using Projects for "Project Management" – i.e. for organizing tasks and activities, and working with your team and your client to deliver Project outcomes.

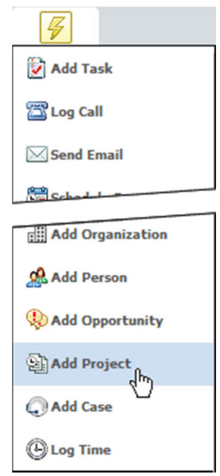
8.2 Defining your Project

Whenever you have a Project to deliver, the best place to start is with a pencil and paper. (And maybe a hot coffee and some donuts!) Make some lists; do a mind-map; draw a "work breakdown structure" or a "network diagram". In short, use whatever tools and approaches you are comfortable and familiar with to answer the following questions:

- What does "Finished" look like in this Project? How will we know when we are done?
- At a really high level, what are the big "chunks" or **Stages** of work that are needed to complete the Project? In a software development project, for example, these might be things like: *Planning*, *Design*, *Development*, *Testing* and *Roll-Out.*
- What are the detailed **Tasks** needed to complete each of the major Stages, and who will perform them? (If you don't know who specifically, think about what kind of person or skills will be needed for each Task.)
- Which Tasks must be done before other Tasks can start. If you're building a house, for example, *Pour Foundations* had better be complete before you start on *Build Walls*!

8.3 Adding your Project to BlueCamroo

When we left off discussing the Sales Cycle at the end of Section 4.4, we noted that it is possible to ***Convert*** an Opportunity directly into a Project, carrying over all the related history. You don't have to use Opportunities to use Projects, however, so let's start by looking at adding a Project 'cold' and come back to converting Opportunities later.



To add your new Project to BlueCamroo, drop down the Quick Action button and select 'Add Project'. Alternatively, when working in any Customer record, click the **Add** button next to Projects on the left hand explorer bar.

You will have the choice to add your Project using a **Project Template** if any are set up for you, but for now we'll focus on building the Project from scratch. (Project Templates are discussed in Section 8.4 below.)

Having created the Project record, you can now go ahead and set up the details of your Project.

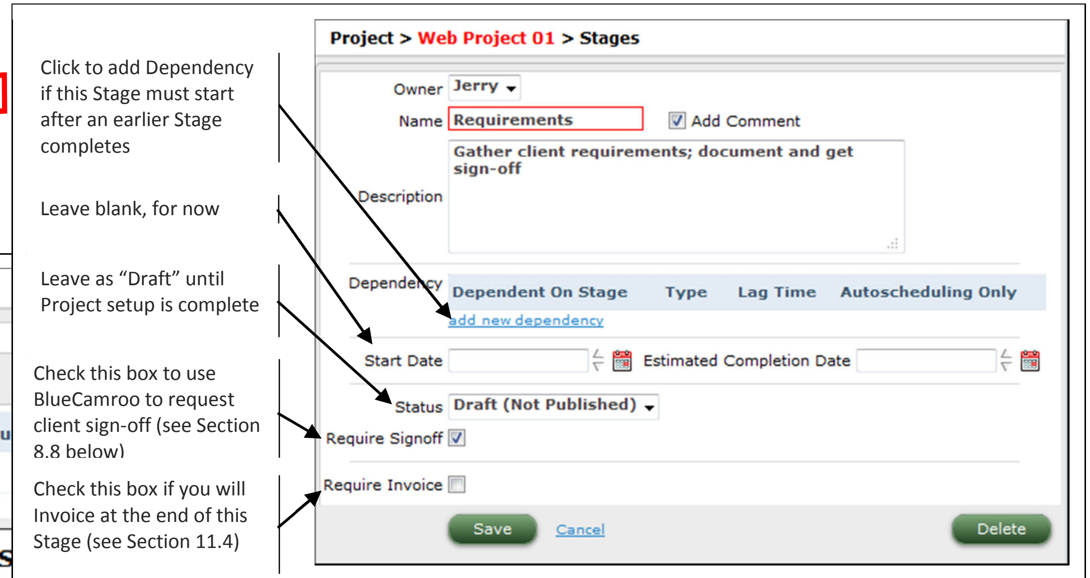
Project Stages

If you've spent some time defining your Project on paper, you'll have all your tasks grouped into the handful of big "chunks" or Stages of work that are needed to complete the Project. To enter these into the system, click on the **Stages** button on the toolbar and add your first Stage. (See following page.)

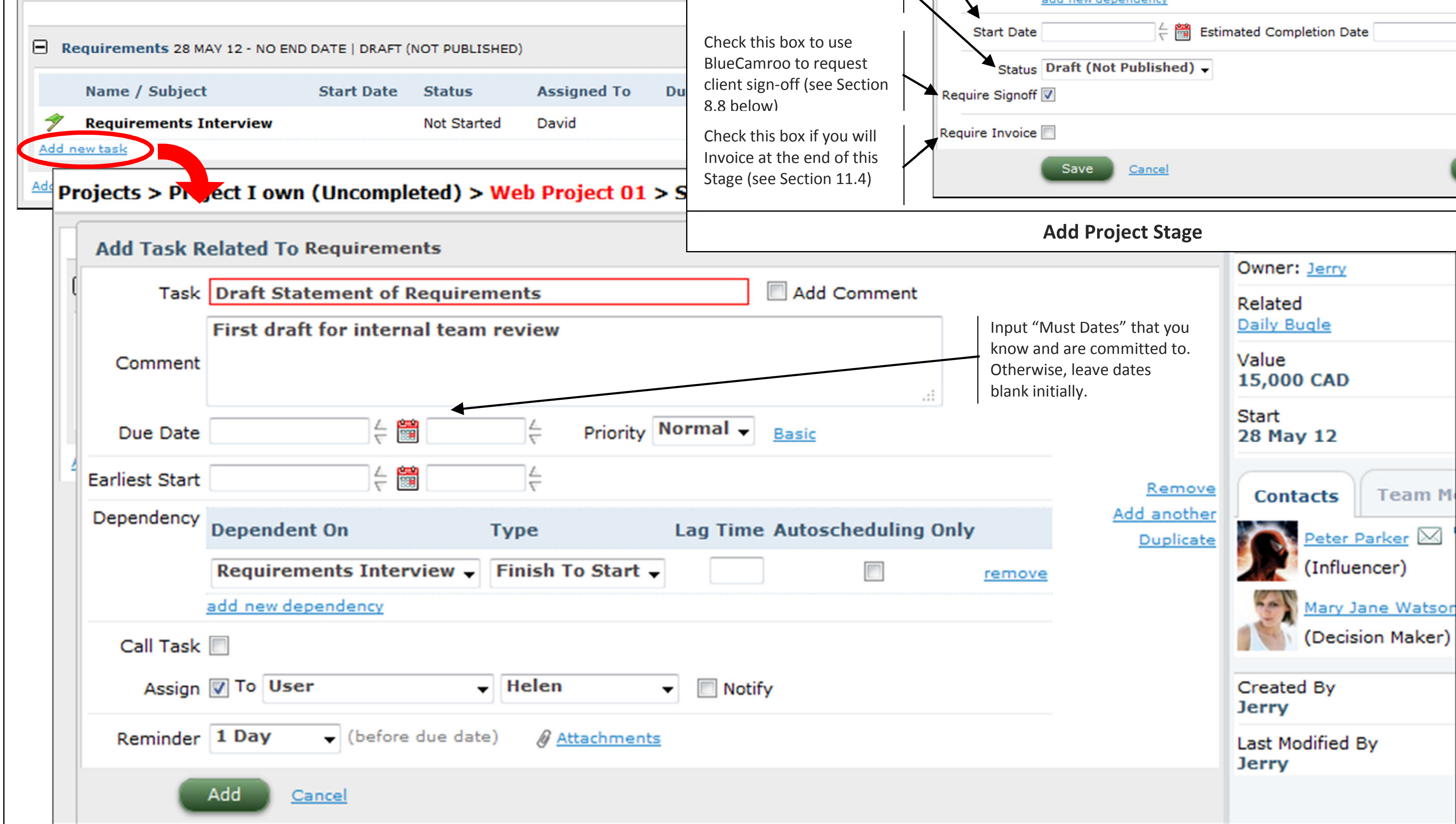
Stage Tasks

Now that you've added a Stage, you can begin entering the Tasks that make it up. (Some people prefer to enter all the Stages and then all their Tasks; others like to complete all the setup for each Stage before moving onto the next. It really doesn't matter, so pick whichever way feels comfortable for you.)

Continue adding Stages and Tasks
until all the steps of your Project are complete…



Add Project Stage



Add Stage Tasks

Contact Roles

We came across Contact Roles back in Section 4.3 when we were discussing Sales Opportunities. Contact Roles in Projects have a similar purpose, telling you who in the Client organization (i.e. which Contacts on the client Organization) you deal with for each aspect of the Project. Contact roles in a Project have one additional function, however – they are also part of granting access for your client's people to log in as External Users to share information with you in BlueCamroo. You can read more about this in Section 8.7 below.

To add Contact Roles, click on the **Settings** button on the toolbar, and then on **Contact Roles**, and add the relevant Contact for each Contact Role.

Team Members

Team Members are the people from within your own organization involved in the Project. Adding details of Team Members provides a number of benefits:

1. Team Members are listed first when you want to post any notifications about the Project.
2. Team Members see the Project in their default ***Projects I work on*** view in the main Projects listing.
3. If you are using strict User Permission controls in BlueCamroo, adding a Team Member is the quickest way to give a user access to the Project.

To add Team Members, click the **Settings** button on the toolbar, and then **Team Members**

8.4 Adding a Project using a Project Template

Whilst in some organizations every Project is truly unique, most businesses make their money doing pretty much the same kind of Project for a succession of different clients. If you are a web designer, for example, each website you build will be different, but *the steps you go through* to design and build it will be much the same every time.

Project Templates enable you (if you are the System Administrator) to pre-define "the way we do things around here" for each of the types of Project your organization commonly undertakes (see Section 18.8 on page 49 for more information on how to create Project Templates.)

To create a Project using a Project Template, simply pick the appropriate Project Template while Adding your Project, and all the pre-defined Stages, Tasks and Team Member Roles will automatically be copied into your new Project, ready for you to make final adjustments.

Important: To populate Stages and Tasks from a Project Template, the Template must be selected while creating the Project. The selected Template can be changed after a Project has been created, but this will only affect how Sign-Offs and Invoices are handled; not the Stages and Tasks.

8.5 Starting your Project

So far, we've focused on setting up your Project, but if you've followed the tips above and kept all the Stage Statuses set to ***Draft (Not Published)*** then no-one else on your team yet knows about it. (When you create a Project from a Template, the Stage Statuses will also default to ***Draft (Not Published)***.) Now it's time to finalize the dates on your Tasks, and issue tasks to your team to get working.

Populate Dates

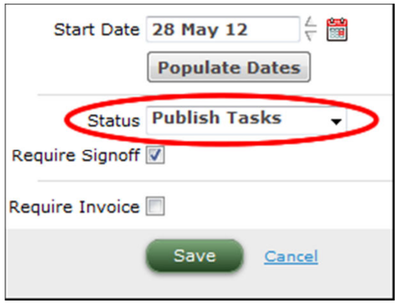
Returning now to your list of Stages, edit the first Stage (i.e. the Stage that should start first in the project, whether or not it's first in the list) and input the Start Date for the Stage – which is also the Start Date for the Project as a whole. When you save the Stage, you'll now see a new Populate Dates button at the head of the list. Click this button and BlueCamroo will now do two things:

1. Estimate the Start and Finish date of all tasks and stages throughout the whole project, using project dependencies and estimated Task durations to set the dates.
2. Update all tasks assigned to Team Member Roles (e.g. 'Analyst', or 'Quality Control') with the individual user(s) who have been associated to the Project in those roles.

Now take a moment to review the dates that BlueCamroo has set, and make any amendments you wish.

'Publish' the Project Tasks

Tasks within a Project Stage that is in ***Draft (Not Published)*** status are not published to users' task lists. This lets you play around with the Project and get everything just right before you issue task requests to other people.



If you're happy everything is now the way you want it, go ahead and update the Status for the first Stage to ***Publish Tasks***.

Update the status of each Stage from which you wish to publish tasks to your team-members' task inboxes. Some project managers like to publish all their stages at the outset of a project; others prefer to release tasks only stage-by-stage. The choice is yours.

8.6 Managing your 'Live' Project

Your Project advances as you and your colleagues complete your assigned Tasks. If you are the Project Manager, you'll want to check on the progress of your Projects regularly, so you can track progress and make any changes that may be necessary to keep things on track. The four main views you will use to do this are:

- ***The Project Update Stream*** which enables all your team to exchange information on the project, both with other team members and with invited customers and suppliers (See Section 8.7 below for more information on involving customers and suppliers in your projects).
- ***The Project Snapshot Page***, which gives you an overview of Project status and activities on one page.
- ***The Project Stages Page***, which gives you the 'big picture' view of your Stages and Tasks progress.
- ***The Project Timeline Page***, which gives you a visualization of how Project Tasks fall in the Project Schedule.

The day-to-day work of managing your project will consist mostly of reviewing, rescheduling and chasing **Tasks**; updating **Stages**; managing **Signoffs** (see below); and raising and chasing **Invoices** (see Section 11). If you use **Cases** to track project issues and receive feedback from Clients, you'll also want to stay on top of open Cases. (See Section 10 for more about Cases.)

8.7 Involving Clients

In addition to helping you share information and manage activity with your team members, BlueCamroo can also help you collaborate with Clients. By inviting your clients as **External Users**, you make it possible for them to log in to your BlueCamroo workspace and access certain data that relates to themselves and their projects.

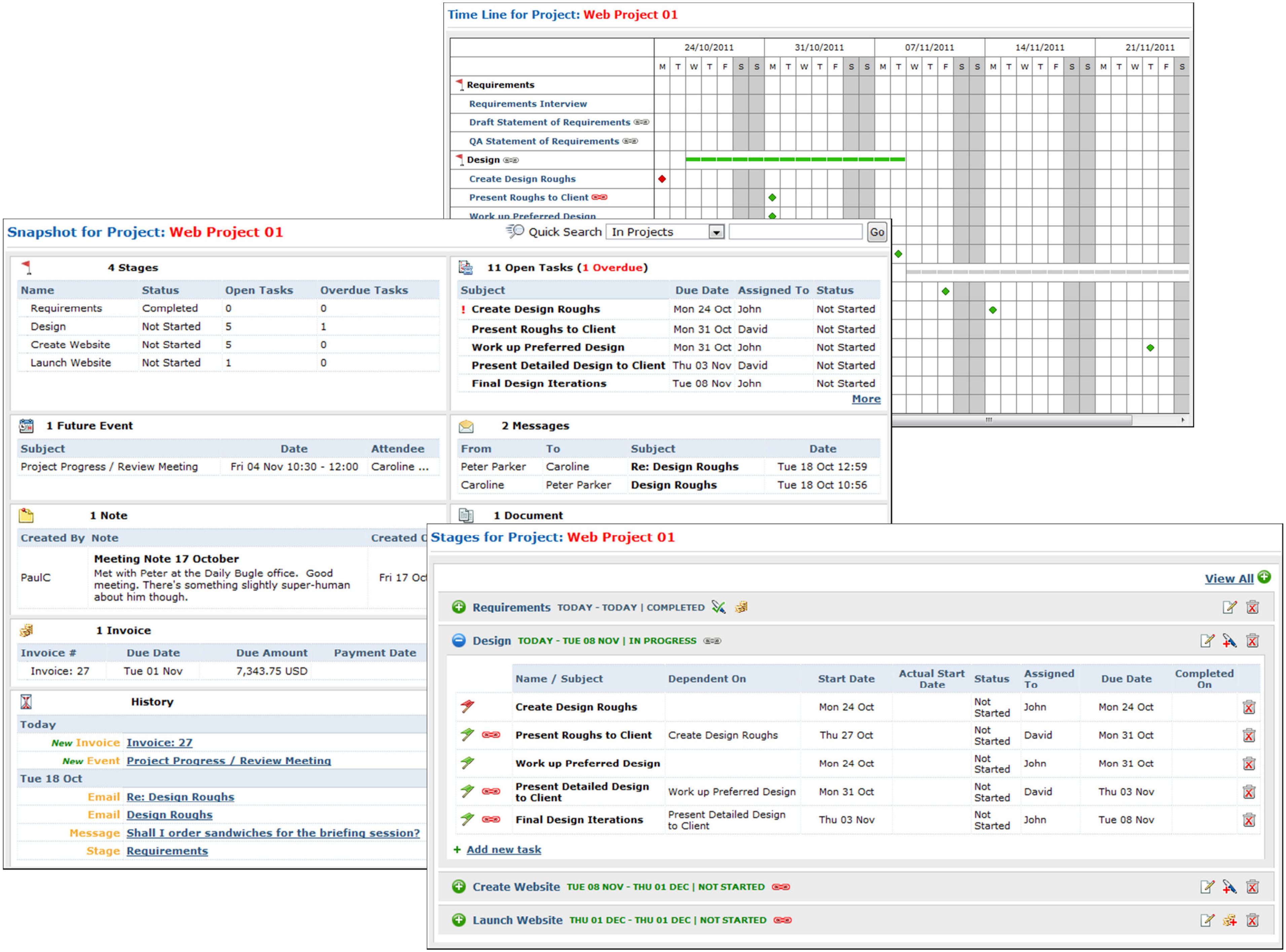
External User access supports the following processes:

- You can ***Assign Tasks*** to external Users, which they receive in their Home Page in the normal way.
- External Users can ***View Project Timeline*** of Projects for their Organization. (Note: the External User must be associated to the Project via a **Contact Role**. Not every Contact at our Client's company should necessarily have access to every Project.)
- External Users can view and respond to **Stage Signoff** requests.
- External Users can ***View open Invoices*** and, If you have enabled online payment via BlueCamroo (see Section 18.7), pay online.
- External Users can view and accept / reject **Sales Quotes**.
- External Users can ***Raise and work with cases***, including reading your team's Case Comments, and responding with Comments of their own.

Adding External Users

Anyone who exists as a Person in BlueCamroo can be invited as an External User. There are two ways to do this: When viewing a Person record, click the **Settings** button on the toolbar, then **Invites**. Alternatively, within an Organization select **Contacts** from the data explorer bar, then select the Contact you wish to invite. An 'invite' link will show in the right hand panel.

BlueCamroo sends the invitee a welcome message. You (or your System Administrator) can edit the text of this message in **Setup** | **Automation** | **Email Template** and pick the ***Welcome external user*** template.

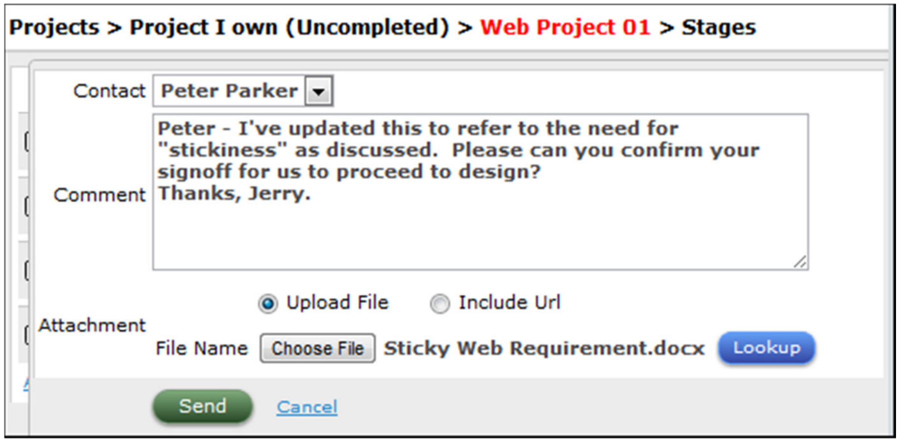


Time Line for Project: Web Project 01
24/10/2011
31/10/2011
07/11/2011
14/11/2011
21/11/2011
Requirements
Requirements Interview
Draft Statement of Requirements
QA Statement of Requirements
Design
Create Design Roughs
Present Roughs to Client
Work up Preferred Design
Snapshot for Project: Web Project 01
Quick Search
In Projects
Go
4 Stages
Name
Status
Open Tasks
Overdue Tasks
Requirements Completed 0 0
Design Not Started 5 1
Create Website Not Started 5 0
Launch Website Not Started 1 0
11 Open Tasks (1 Overdue)
Subject
Due Date
Assigned To
Status
Create Design Roughs Mon 24 Oct John Not Started
Present Roughs to Client Mon 31 Oct David Not Started
Work up Preferred Design Mon 31 Oct John Not Started
Present Detailed Design to Client Thu 03 Nov David Not Started
Final Design Iterations Tue 08 Nov John Not Started
More
1 Future Event
Subject
Date
Attendee
Project Progress / Review Meeting Fri 04 Nov 10:30 - 12:00 Caroline ...
2 Messages
From
To
Subject
Date
Peter Parker Caroline Re: Design Roughs Tue 18 Oct 12:59
Caroline Peter Parker Design Roughs Tue 18 Oct 10:56
1 Note
Created By
Note
PaulC
Meeting Note 17 October
Met with Peter at the Daily Bugle office. Good meeting. There's something slightly super-human about him though.
Fri 17 Oc
1 Document
1 Invoice
Invoice #
Due Date
Due Amount
Payment Date
Invoice: 27 Tue 01 Nov 7,343.75 USD
History
Today
New Invoice Invoice: 27
New Event Project Progress / Review Meeting
Tue 18 Oct
Email Re: Design Roughs
Email Design Roughs
Message Shall I order sandwiches for the briefing session?
Stage Requirements
Stages for Project: Web Project 01
View All
Requirements TODAY - TODAY | COMPLETED
Design TODAY - TUE 08 NOV | IN PROGRESS
Name / Subject
Dependent On
Start Date
Actual Start Date
Status
Assigned To
Due Date
Completed On
Create Design Roughs Mon 24 Oct Not Started John Mon 24 Oct
Present Roughs to Client Create Design Roughs Thu 27 Oct Not Started David Mon 31 Oct
Work up Preferred Design Mon 24 Oct Not Started John Mon 31 Oct
Present Detailed Design to Client Work up Preferred Design Mon 31 Oct Not Started David Thu 03 Nov
Final Design Iterations Present Detailed Design to Client Thu 03 Nov Not Started John Tue 08 Nov
+ Add new task
Create Website TUE 08 NOV - THU 01 DEC | NOT STARTED
Launch Website THU 01 DEC - THU 01 DEC | NOT STARTED

8.8 Requesting Signoff

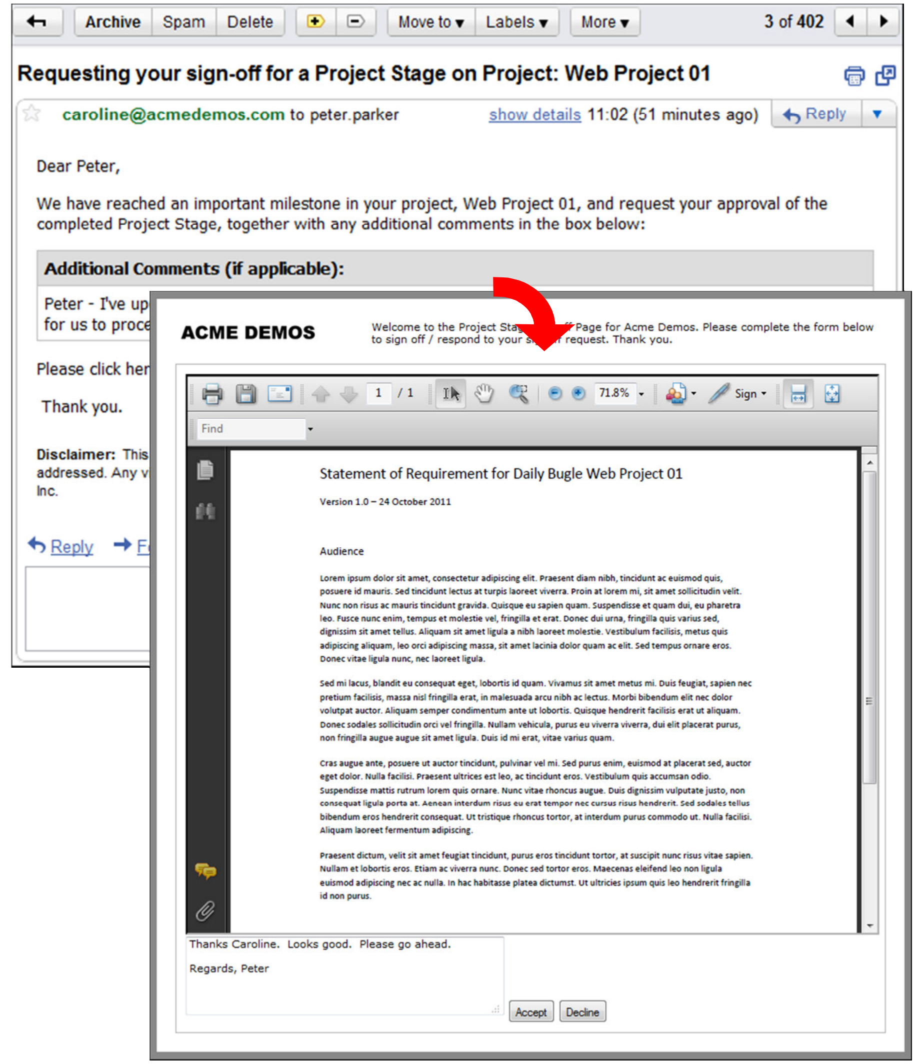
When a Stage is defined as requiring client signoff, you can use BlueCamroo to request the signoff.

Go to the **Stages** page and click the **Request Signoff** button on the relevant Stage. Add any comments and attach the document / image etc for which you require signoff, then Send.



Your client will receive a **Signoff Notification Email**. Simply by replying to the email and including the word 'Accept' in the subject, your customer can confirm their signoff, and this will be recorded in BlueCamroo. Additionally, if the person to whom you sent the Signoff request is already invited to BlueCamroo, the email will include a link that enables signoff directly within BlueCamroo. (You or your System Administrator can modify the standard content and format of the Signoff Notification Email; see Section 18.8 on Page 49 for more information.)

When the Stage is signed off, BlueCamroo records details of the signoff, and also automatically notifies the User who requested the Signoff. The **Request Signoff** button disappears from the Stage, and is replaced with a 'Signed Off' indicator



Important: Your client needs to be set up as an **External User** as detailed in Section 8.7 above to access and respond to the Signoff Page.

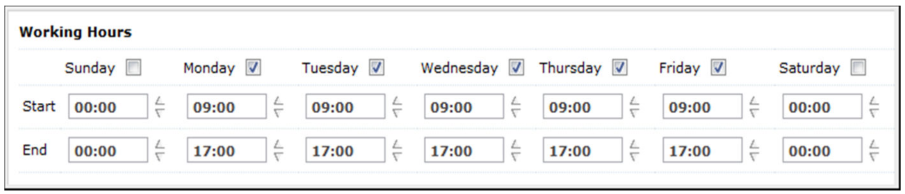
9. Working with Calendars and Events

9.1 Setting up your Calendar

Every User in BlueCamroo has an individual Calendar. You can create and share Events (Meetings; Appointments; etc) and schedule time with co-workers. Options for your personal Calendar are included in your Personal Settings (**Setup** | **Personal Setup**).

Working Hours

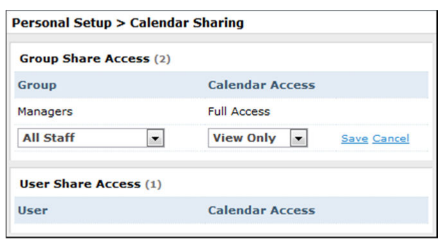
The setup of Working Hours influences how Tasks are scheduled, and also the section of your Calendar that displays as "working hours". By default, Tasks with a 'Due by' date set will be scheduled to complete by the end of your Working Hours on that day.



Calendar Sharing

By default, the only people with access to your Calendar are you; System Administrators (who have access to see everything in BlueCamroo, apart from your To Dos); and your direct Manager. (Go to **Setup** | **Personal Information** and view the **Personal Details** section to check who is set up as your Manager in BlueCamroo.)

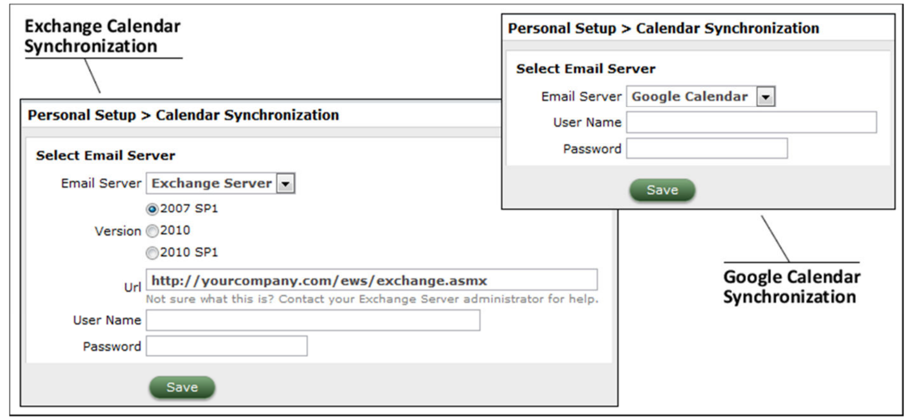
If you would like other people to be able to view and/or update your Calendar, you need to ***share*** your Calendar. Go to **Setup** | **Calendar Sharing** and add as many Shares as you require.



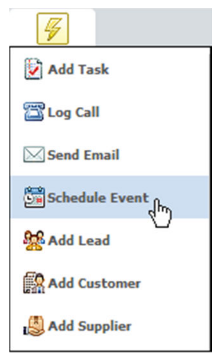
Calendar Synchronization

BlueCamroo can automatically synchronize your Calendar with Google Calendar or Microsoft Exchange (version 2007 SP1 and later).

Click **Setup** | **Calendar Synchronization** to set up Calendar Synchronization.

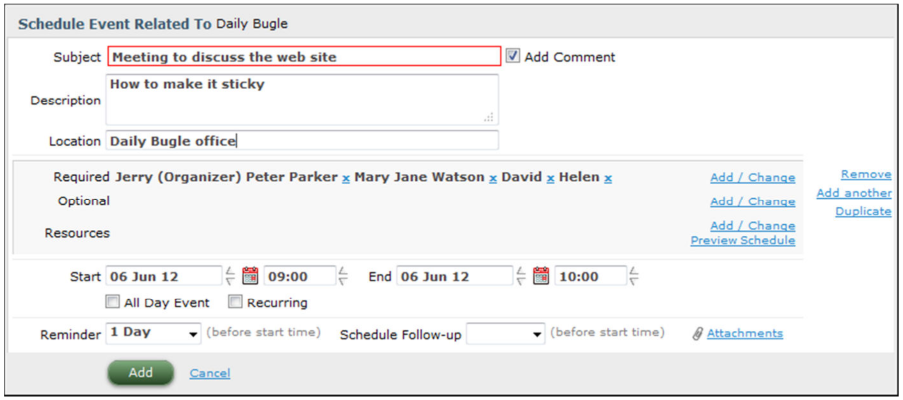


9.2 Scheduling Events



To create a new Event, use the Quick Action button as usual, or when working in any data record simply click the **Add** button next to Events on the left hand explorer bar to add a related Event.

Add all required attendees, and save. BlueCamroo will automatically issue notifications, unless you have Calendar Synchronization setup in which case the event will synchronize to your Exchange or Google calendar, which will issue the invitations.



9.3 Booking Meeting Rooms and Equipment

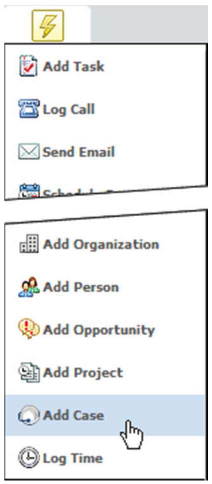
As noted, every BlueCamroo user has his or her own Calendar that can be shared with any other User(s) or User Group(s) in the System. It is also possible to have calendars for general **Resources** that need to be booked as part of arranging meetings and other activities: meeting rooms, for example, or audio-visual equipment.

You (or your System Administrator) can create Resources via system setup. Click **Setup | Event Resources**.

10. Cases - Complaints, Issues and Customer Support

BlueCamroo users find many different ways to use **Cases**. In this section we'll tell you about the three most popular. At least one will probably be applicable in your organization, but who knows – you may come up with something we've never seen done before!

10.1 Example Use #1 – Handling Complaints



However great your service, sometimes customers will complain. To use Cases for complaint tracking and handling, simply create a Case for each complaint raised, and use the Update Stream, tasks, etc. to track your internal process to resolve the Complaint. Cases are related to the Customer (and the Contact, if the Customer is an Organization), and optionally to a Project, Stage and Product / Service, so they are a natural tool for complaint tracking.

To create a Case, drop down the Quick Action button and select **Add Case**. Alternatively, when working in any Customer or Project record, click the **Add** button next to Cases on the left hand explorer bar.

Lastly (see Section 5), you can add Cases from the **Social Scout**'s Client Support Search Channel.

10.2 Example Use #2 – Tracking Internal Issues

Whilst Cases are certainly used to track Customers' issues, there's nothing to stop you also using them to track internally-generated Issues.

Here at BlueCamroo, we use Cases to track both development ideas and bug-fixes. We use some simple **Workflow Rules** (see Page 50) to update everyone as Cases are moved along towards completion.

Tip: If you want to use Cases for more than one purpose, consider adding ***Case Type*** as an **Extra Field** – or ask your System Administrator to do so – so that you can filter down to just one type of Case at any time. (See Section 18.2 for more information on Extra Fields.)

10.3 Example Use #3 – Support Ticketing

Important: The steps outlined in this section make use of system Workflow Rules. These need to be Activated before being used. See Section 10.4 below.

By combining some special features of Cases with Workflow Rules, BlueCamroo lets you run a simple Email-based **Customer Support Ticketing System**. Here's how it works:

1. Creating the Ticket (Case)

Back in *Section 7 – All About Email*, we mentioned a special Email Address:

support@[*your-bluecamroo-domain*].bluecamroo.com

Emails sent to this address by anyone who is a Customer (Person), or contact within a Customer Organization in your BlueCamroo workspace automatically create a Case. The subject of the Email becomes the Case Subject; the body becomes the Case Description. The email itself is attached to the Case.

Now, you're not likely to ask your customers to send emails to this address, but if you ask whomever controls your normal business email systems to redirect all email from ***support@[your-real.domain.com]*** to this address, then you've made the first step to having a dedicated support ticketing system by capturing all support requests in BlueCamroo.

2. Alerting you to the new Ticket

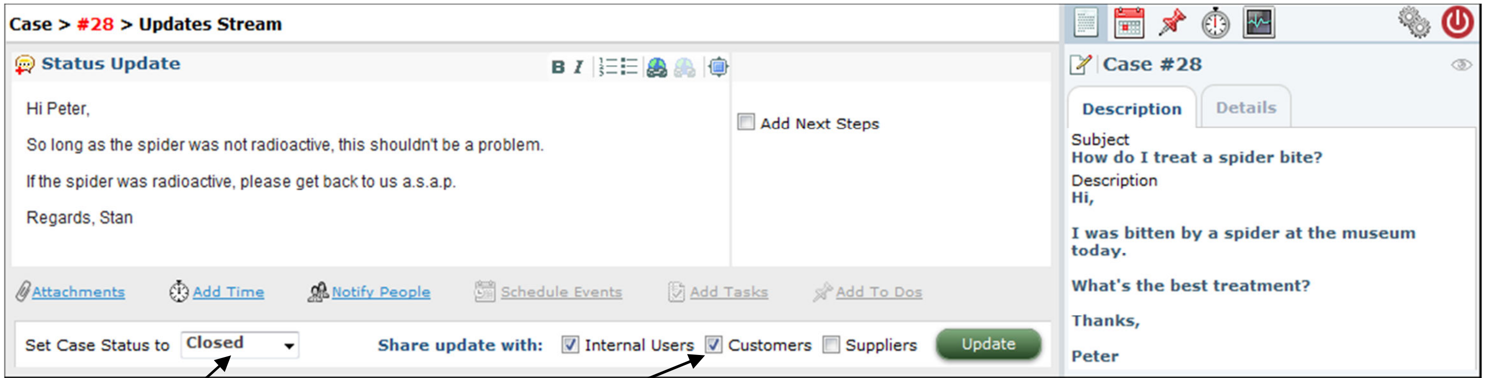
If your business has a lot of support tickets, you might have a team member whose job it is to always be checking for New / Open cases. If not you'll want some way to be alerted when a new Ticket is created.

BlueCamroo comes pre-loaded with **Workflow Rules** that enable you to notify your Support Manager or even your whole team every time a new Ticket is created. You can also send an acknowledgement to your Customer, which reassures them that their issue is being addressed.

3. Responding to the Ticket

Like all the other main data items in BlueCamroo, every case has its own Updates Stream. When you post an update for a Case, you have two additional options:

- You can ***share the Update with Customers***, and
- You can ***modify the Case Status***.



Case has been set to 'Closed' If the Customer responds, this will be re-opened automatically.

Update is shared with Customers

Again, we can use a BlueCamroo Workflow Rule to watch for these new Updates and email the response to the customer. The example email on the right shows how the email appears.

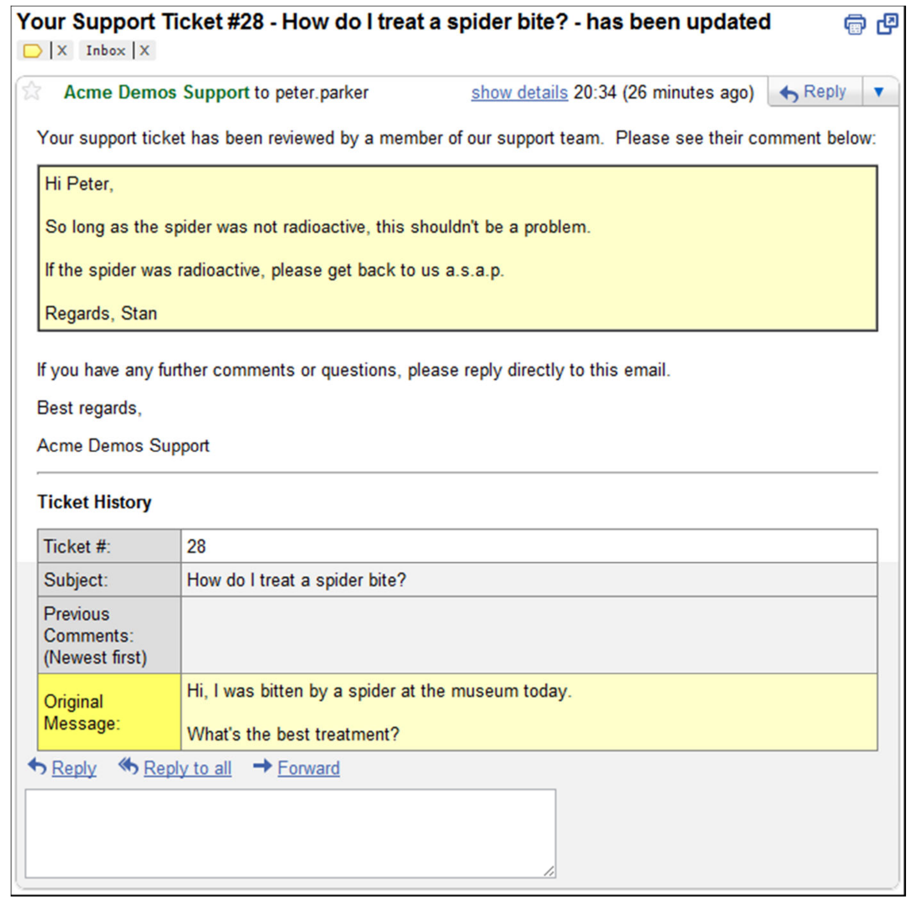
4. Capturing Client Responses

You've ***updated the Case***, checked to ***share with Customers*** and set the case status to ***Closed***. BlueCamroo has sent your response to the client. You're done.

And then your client responds!

BlueCamroo handles the response too, as follows:

- The Case Status is updated to ***Re-Opened***
- Your client's response is read back out of their email and attached as a new **Case Update**
- If you're using the standard Support Ticketing **Workflow Rules** supplied with BlueCamroo, you'll receive an email notification with the client's update.



10.4 Activating the Ticketing Workflow Rules

If you are the System Administrator for your BlueCamroo workspace, you need to activate the Case Ticketing workflow rules before you can use the email-based Support Ticketing processes detailed above.

You will need to set the 'From' email address for each notification email, and you can also take the opportunity to customize the workflow rules, for example to control who is notified, and apply your own branding to the emails.

Click **Setup** **| Automation | Workflow Rules** to access Workflow Rules, and see also Page 50 for more information about Workflow Rules in general.

System Setup > Automation > Workflow Rules

Case

Object	Rule Name	Active
Case: Details	1.Notify New Case (Ticket)	✗
Case: Details	4.Re-Open Closed Case	✗
Case: Case Comment	2.Notify new Case Comment to Client	✗
Case: Case Comment	3.Notify Client Comment to Case Owner	✗

User

Object	Rule Name	Active
User: Details	Welcome message for internal user	✓

Add new workflow rule

Case Workflow Rules are initially set to 'Inactive'. You (or your System Administrator) will need to edit each Workflow Rule and set it Active before Email Support Ticketing will work.

11. Quoting, Billing and Receiving Payment

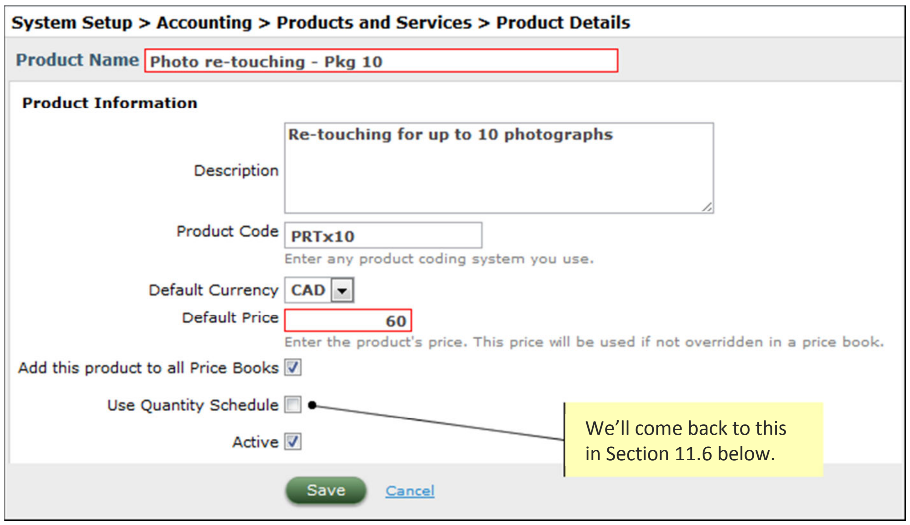
11.1 Overview

Just as BlueCamroo supports the Sales Cycle through generating an **Opportunity** all the way to **Project** delivery, the system also supports generating **Sales Quotations**, Creating **Invoices** and receiving **Paytesttestment**.

11.2 Products and Price Books

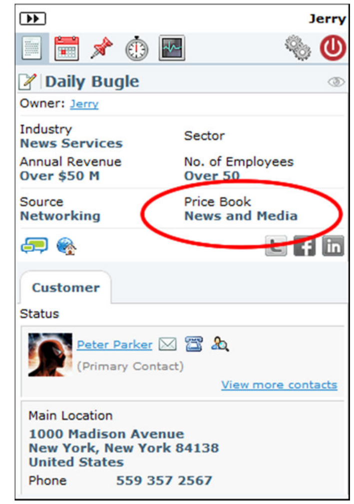
Sales Quotations and Invoices make use of **Products.** (In fact "Products and Services", but we'll just say Products for short.) To set up Products, you – or your System Administrator – click: **Setup | Accounting** | **Products and Services.**

If you're visiting the Products and Services setup area for the first time, you'll find one Product already there: "Billable Hour". Leave that in place, and continue by creating some of your own Products.



You'll notice above there's a checkbox that says ***Add this product to all Price Books***. Many businesses charge different prices to different types of customer: Corporates; Government; Non-Profits; etc. In some businesses, not every Product or Service is offered to every type of customer.

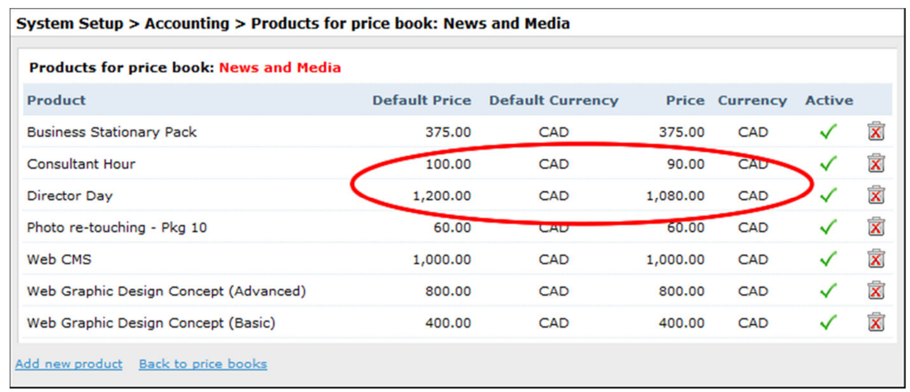
BlueCamroo supports these kinds of business rules via Price Books. Every **Customer** has a designated **Price Book**, and each Price Book defines the products available to customers which use that Price Book, and the default price of each Product to those customers.



In the example shown to the right, the ***Daily Bugle*** is set up to use a ***News and Media*** Price Book.

Price Books also require System Administrator privileges to set up. Click: **Setup | Accounting | Price Books.**

As you can see, **Price Books** redefine the price, and optionally the Currency, for each **Product**. Products that don't appear in the Price Book (or are set to ***Inactive***) are not available to sell to Organizations that are linked to that Price Book. In this example, customers using the News and Media price book receive special hourly and daily rates for Consultant Hours and Director Days (billable time).



System Setup > Accounting > Products for price book: News and Media

Products for price book: News and Media

Product	Default Price	Default Currency	Price	Currency	Active	
Business Stationary Pack	375.00	CAD	375.00	CAD	✓	
Consultant Hour	100.00	CAD	90.00	CAD	✓	
Director Day	1,200.00	CAD	1,080.00	CAD	✓	
Photo re-touching - Pkg 10	60.00	CAD	60.00	CAD	✓	
Web CMS	1,000.00	CAD	1,000.00	CAD	✓	
Web Graphic Design Concept (Advanced)	800.00	CAD	800.00	CAD	✓	
Web Graphic Design Concept (Basic)	400.00	CAD	400.00	CAD	✓	

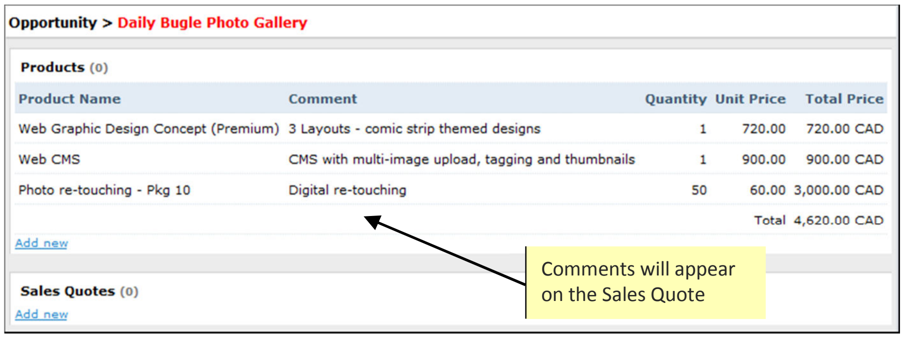
Add new product Back to price books

11.3 Creating and Issuing Sales Quotes

When you're working with Sales Opportunities, one of the most common things you might need to do is send your prospective customer a written quotation or proposal. BlueCamroo enables you to do this with **Sales Quotes**. Here's how:

Add Products and Services

First select the **Opportunity** you wish to quote for (or create a new Opportunity), then click the **Products and Sales Quotes** button on the toolbar. Add all the relevant Products to be included in the quotation:


Opportunity > Daily Bugle Photo Gallery

Products (0)

Product Name	Comment	Quantity	Unit Price	Total Price
Web Graphic Design Concept (Premium)	3 Layouts - comic strip themed designs	1	720.00	720.00 CAD
Web CMS	CMS with multi-image upload, tagging and thumbnails	1	900.00	900.00 CAD
Photo re-touching - Pkg 10	Digital re-touching	50	60.00	3,000.00 CAD
			Total	4,620.00 CAD

Add new

Sales Quotes (0)

Add new

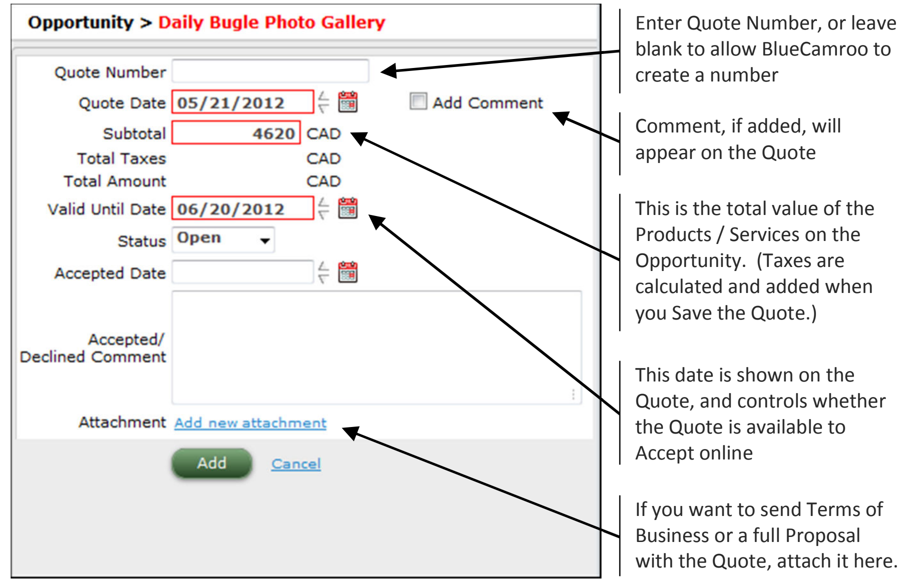
Comments will appear on the Sales Quote

(Note that as you add Products you will be offered the default price for each Product taken from the relevant Price Book. You are able to override the pricing manually, however.)

The Opportunity Value will automatically be updated to match the total of the Products and Services that you are adding.

Create a Sales Quote

Now click the **Add new** link in the Sales Quotes section of the page and complete all details of the Quotation. In particular, be sure to set an appropriate ***Valid Until Date***. This is the Date until which the system will allow the Sales Quote to be Accepted online.



Send the Sales Quote

The final step is to send the Sales Quote to your customer. Click the 'Email' button to preview and send the Quotation.


Sales Quotes (0)

Quote #	Quote Date	Send Date	Total Amount	Valid Date	Status
15	Today		4,620.00	06/21/2012	Open

Add new

Your customer will receive an email with your Sales Quote as a PDF attachment (see next page).

Both the Email and Sales Quote layout itself can be customized to suit your business. See Section 18.7 for further information about customizing these documents.

Your Customer's Response

By simply replying to the email and including the word 'Accept' in the subject line, your customer can notify you that they accept your quotation. BlueCamroo will recognize this, and update the quotation and Opportunity accordingly. Additionally, if the contact is already Invited as an External User in your

BlueCamroo workspace, the quotation cover email will include a hyperlink that your customer can click to Accept the Sales Quote (or respond with comments) online in BlueCamroo

Whichever method your Customer uses to respond, you will receive an automated email from BlueCamroo to alert you, and the Status of the Sales Quote will be updated.

11.4 Creating and Issuing Invoices

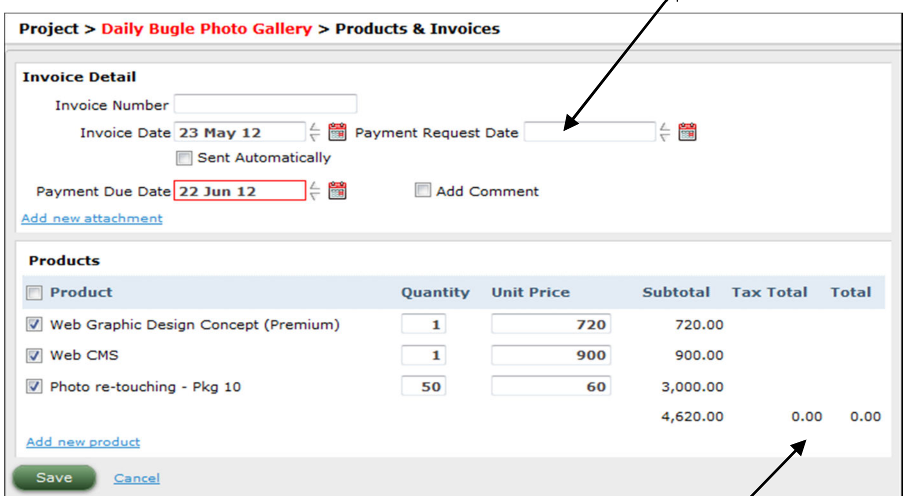
Creating an **Invoice** is the mirror image of creating a Sales Quote. But whereas Sales Quotes relate to Opportunities, Invoices relate to Projects. First select the **Project** you wish to invoice for (or create a new Project), then click the **Products and Invoices** button on the Toolbar.

Create an Invoice

If you created the Project by converting from an Opportunity that had Products (and perhaps Sales Quotes) on it, you'll find those details have been carried over to the Project. If not, add any Products that are required for the Invoice.

Now click the **Add new** link in Invoices and complete details of your invoice:

See Page 33 below

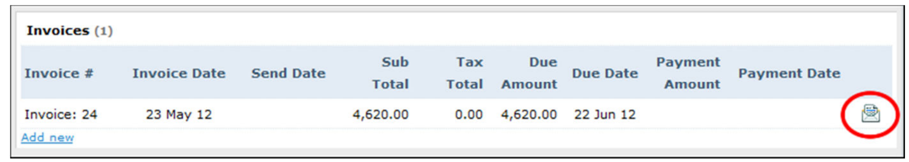


Taxes and totals calculate after you press 'Save'

Note: BlueCamroo does not insist you have Products configured to generate an Invoice. If you have no Products defined, BlueCamroo will simply create the Invoice for the Project Value (or part Value, if part-billing on a Project Stage).

Send the Invoice

Sending an Invoice is like sending a Sales Quote. Simply click the 'Email' button to preview and send the Invoice. (If you selected "Send Automatically" when setting up your invoice it will send automatically on the Invoice Date and you can skip this step.)

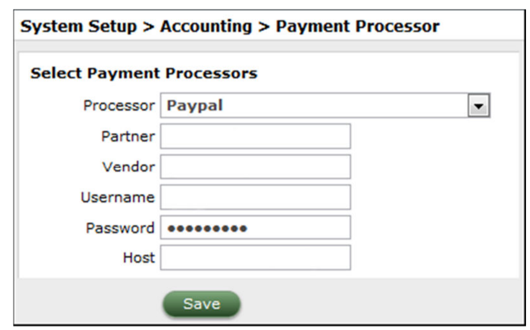


Your customer receives an email with the Invoice as a PDF attachment.

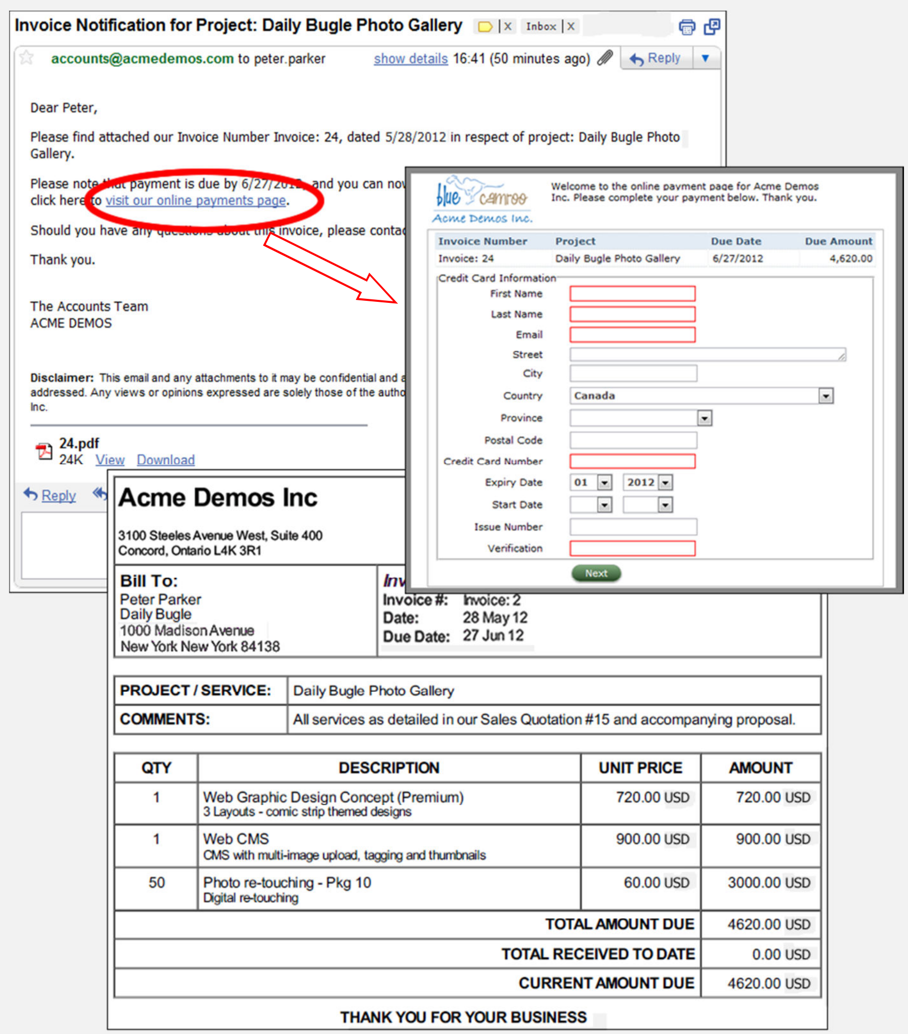
If you have set up details of your Payment Processor, the cover email will also include a link to your Online Payment Page in BlueCamroo, allowing your customer to pay online through the system.

11.5 Receiving Payment

BlueCamroo's Payment Processing engine currently supports Paypal Standard, Paypal Pro, and Moneris. If you have an account with any of these organizations, go to **Setup | Accounting | Payment Processor** to input your Account information (requires System Admin access level).



Payment information for Invoices paid online is updated in BlueCamroo automatically. If you do not wish to use online payments, or if an individual client chooses to pay you by some other method, you can update the Invoice manually to show it has been paid. Simply return to the relevant **Project** and **Invoice**, and update the Payment details on the Payments tab.



Invoicing Email, Invoice and Payment Page

11.6 Advanced Invoice Features

The following features complement the basic invoicing and payment handling processes described above:

Sending Payment Reminders

BlueCamroo can automatically send Payment Reminders, both before the due date of an invoice to remind your customer a payment is due, and after the due date to chase payment if it has not been made. Further information on setting up Payment Reminders can be found in Section 18.7.

Sending a Payment Request before Invoice

In some circumstances, you may wish to request payment from your customer ***before*** sending a formal invoice. For example, in some regions where creating aninvoice gives rise to an immediate liability to pay over Sales Taxes, even if your customer does not pay you for a considerable time (or at all!), it is common practice to issue a "Pro-forma Invoice" to request payment, and only create the actual Invoice (with full tax details) when payment is received. Another common scenario might be to send Renewal Notices ahead of renewing some periodic service: you don't expect ***every*** customer to actually renew the service, so prefer to wait for renewal payment before creating an Invoice.

In BlueCamroo, these activities are referred to as sending a "Payment Request", and are achieved by filling in the **Payment Request Date** field when creating your invoice (as shown on Page 32). The Payment Request Date should be an appropriate period before the Invoice Date, to give your client time to pay.

Where the Payment Request Date is set, BlueCamroo will respond as follows:

1. Instead of sending the Invoice, the system will send a Payment Request, using the **Global Payment Request Template** (see Section 18.7).
2. If any Payment Reminders are set to run ***before*** the Invoice Date, these will be created in the normal way, allowing you to define 'renewal reminders' etc.
3. If the client pays the requested amount online through BlueCamroo, BlueCamroo will then automatically send out the Invoice, showing fully-paid.
4. If the client pays by some other means, you or a member of your team will need to update the payment details in the normal way ***and send the invoice***.

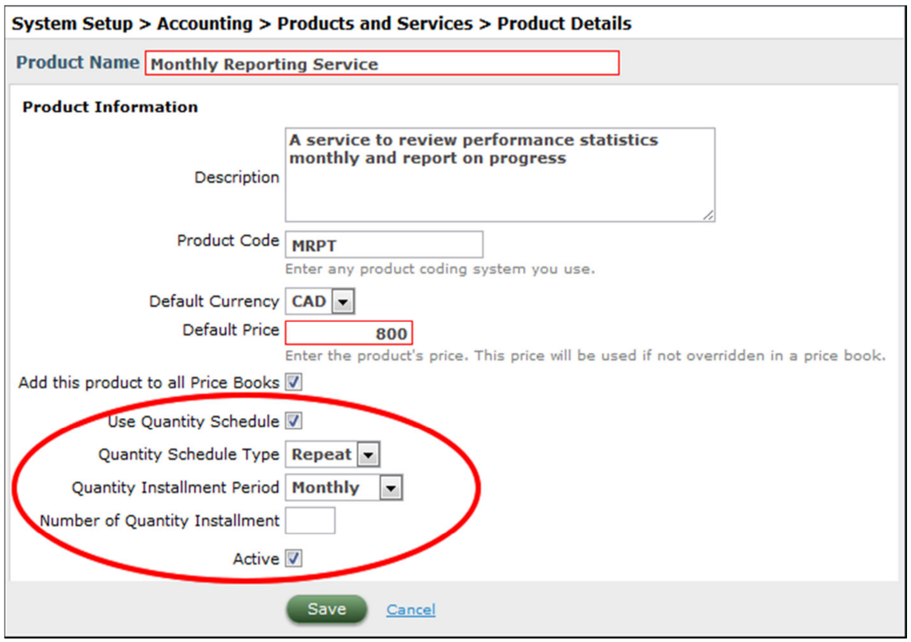
Important: BlueCamroo **only** sends out the receipted invoice automatically if the client pays online through BlueCamroo.

Recurring Invoices

BlueCamroo has the ability to generate recurring invoices for Products and Services that you deliver on a regular basis, or that you allow customers to pay for by instalments. This feature is controlled by the **Product** setup.

When setting up a **Product**, check the ***Use Quantity Schedule*** checkbox and set how this Product (or Service) repeats.

Include this Product in your Project, and create your invoice in the normal way. When sent, this will be the first invoice in the recurring pattern. Now, whenever each regular invoice in the pattern is paid, BlueCamroo will automatically create the next.



Note that if the initial invoice is created with a Payment Request, each recurring invoice will also be preceded by a Payment Request. This makes it possible, for example, to have BlueCamroo automatically send renewal notices and receipted invoices each month or year for a recurring service for as long as required.

Project Stage Payments

Many organizations bill Stage Payments on major projects: a deposit with order, perhaps; so much on achieving certain milestones; and a balance on completion.

BlueCamroo Stages can be defined as Billable, either in a fixed amount, or as a percentage of Project Value. These terms can also be pre-defined in Project Templates (see Page 50 for further information on Project Templates).

When you view the Stages for a Project, you can see at a glance which Stages are billable. Simply click the Send Invoice button in the appropriate stage to create your invoice.

Project Template Invoice, Payment Request and Reminder Templates

An additional feature of Project Templates is the ability to define special Invoice, Payment Request and Payment Reminder formats that override the normal, global formats.

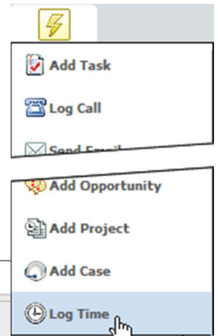
Note that if you change the Project Template associated to a Project after it has been created, the Project Stages and Tasks are not updated, but any special Invoice and Payment Reminder formats for that Template will be used.

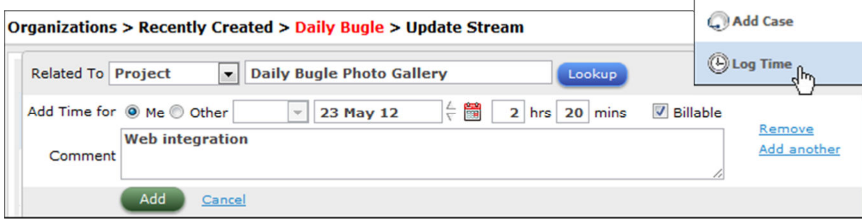
12. Tracking Time

12.1 Overview

Whether you charge clients directly on billable hours, or whether you are simply interested to record and understand how time is spent in your business, BlueCamroo's time tracking processes can help you.

Each User in BlueCamroo has a Time Sheet, where all time spent on projects; with clients; or just on general activities can be logged and reported. The most direct way to add time to your time Sheet is to drop down the Quick Action button and select 'Log Time'. Other ways are described below.

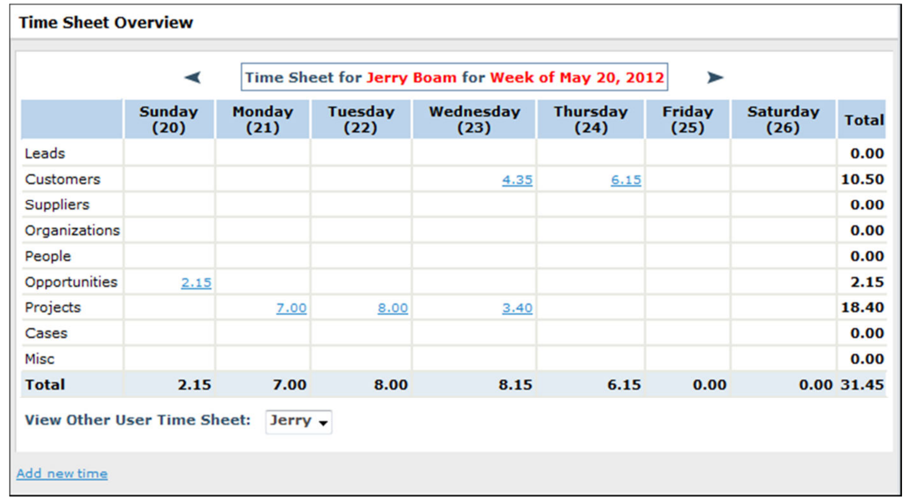




12.2 Time Sheet

To view your Time Sheet, go to the **Home** page and click the **Time** button on the toolbar. Your Time Sheet shows all time recorded, organized by related major data type, e.g Organizations, Projects, etc. (You can click on any time value to view and update its details.)

Note: If you are a System Administrator, you will also be able to select and view other Users' Time Sheets.



Time Sheet Overview

Time Sheet for Jerry Boam for Week of May 20, 2012

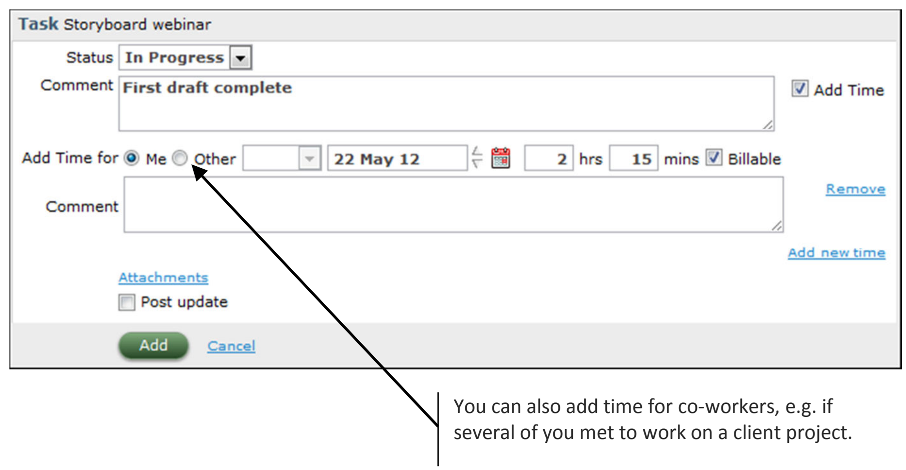
	Sunday (20)	Monday (21)	Tuesday (22)	Wednesday (23)	Thursday (24)	Friday (25)	Saturday (26)	Total
Leads								0.00
Customers				4.35	6.15			10.50
Suppliers								0.00
Organizations								0.00
People								0.00
Opportunities	2.15							2.15
Projects		7.00	8.00	3.40				18.40
Cases								0.00
Misc								0.00
Total	2.15	7.00	8.00	8.15	6.15	0.00	0.00	31.45

View Other User Time Sheet: Jerry

Add new time

12.3 Logging time with Tasks

In addition to logging time directly, as described above, another great way to update your time Sheet in BlueCamroo is to integrate time logging with working your **Tasks**. Whenever you ***Close*** or ***Add Progress*** to a Task, you have the opportunity to add Time. So if you need to track time, it's great to get into the habit of regularly updating Progress on your Tasks to capture time spent, rather than just waiting to Close them when they're done.

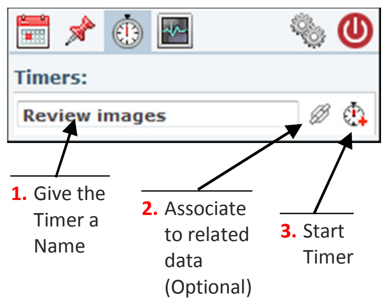


You can also add time for co-workers, e.g. if several of you met to work on a client project.

12.4 Working with Timers

The methods of logging time described above have one thing in common. They assume you ***know*** how much time you spent! If you need help ***measuring*** the time you spend on various activities, as well as recording it, then BlueCamroo's **Timers** tool will help.

In the right hand panel, select the **Timers** tab, and add your first Timer.

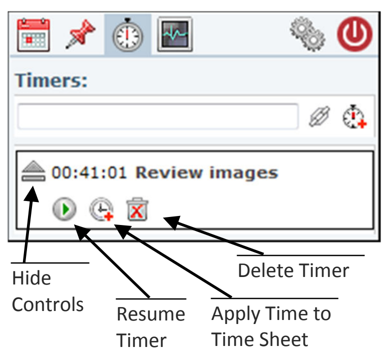


Note you have the option to Associate your Timer to some related data (e.g. Project; Organization) before you start it, but don't worry if you forget; you can always relate the time later.

Once you start the Timer, it will run in the right hand panel until you stop it; even if you close your browser or switch off your computer. You can log in from another computer and your timer will still be there, running, for you to work with.

Stopping your Timer and Recording Time

When you've finished the piece of work that you're timing – or if you just need to take a break – simply hit the Stop / Pause button and your Timer will stop running and display instead the Control button.



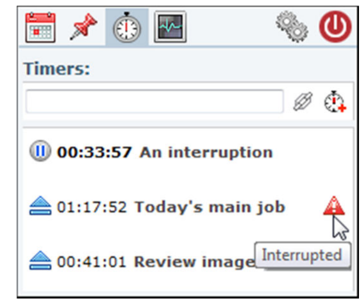
Click on the Control button for more options to work with the Timer. To apply the time to your Time Sheet, simply click the Apply Time button, and the normal 'Log Time' form will display with the correct amount of time pre-inserted. (If you associated the Timer to related data when you created it, the 'Related' information will also pre-populate; otherwise, select it now.)

Tip: You don't need to apply time from your Timer right away. You can continue adding new Timers and post up your Time Sheet at the end of the day, or whenever you find most convenient.

Dealing with Interruptions

In an ideal world, perhaps, you'd be able to focus on each piece of work without interruption until it was completed. If your working environment is anything like ours, however, you're going to get interrupted!

In BlueCamroo, you would normally stop a running Timer before starting a new one. You can, however, start a new Timer ***without*** stopping the running one. In this case, BlueCamroo will treat your new Timer as an **Interruption**.



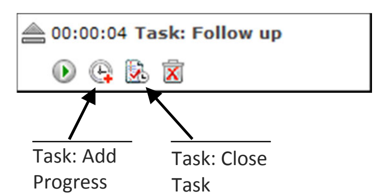
When you interrupt a running Timer, the new Timer starts and the old one shows 'Interrupted' status. As soon as you stop the new Timer (the interrupt), the original Timer will automatically resume.

And yes, you can interrupt your interrupts!

Timing Tasks

A final feature we should mention on Timers is the ability to time **Tasks**. You may have noticed one of the options on the **Action** drop-down menu for your Tasks is '**Add Timer**'. Selecting this option will populate the Timer name, leaving you to just click the Start Timer button.

The only difference between a regular Timer and a Task Timer is the options you see when you hit the Control button



The Apply Time button now launches the Task's **Add Progress** form.

The additional Close Task button now launches the Task's **Close Task** form.

13. Billing Time

13.1 If you Charge for your Time…

If your business tracks time in order to bill clients based on hourly or daily charge-out rates, you'll know it can involve a lot of administration. BlueCamroo can help.

BlueCamroo's **Time Sheet Billing** feature forms a bridge between Time Sheets, where tracked time is recorded, and Invoicing. This section describes how Time Sheet Billing is set up and used. It assumes you've read and understood *Section 11.2 - Products and Price Books*; *Section 11.4 - Creating and Issuing Invoices*; and *Section 12 - Tracking Time*. If necessary, please revisit these sections now.

Note: Setup actions in this section require System Administrator permissions.

13.2 Setup

Billing Grades

Maybe in your business everyone's time is charged out at the same rate, but quite likely different team members – Consultants; Senior Consultants; Directors; Support Team; etc – have different billing rates. BlueCamroo captures this difference through the concept of **Billing Grades**.

To set up Billing Grades, click **Setup | Accounting** | **Billing Grades** and list the Grades that make sense in your business.

System Setup > Accounting > Billing Grades

Billing Grades (4)

Billing Grade
Default
Consultant
Director
Support

Add New

Products

What are the ***units*** that you are actually going to bill your clients for? Maybe you bill Consultant Days; Director Hours; Support Credits?

You define the ***billing units*** in **Products and Services**, just like you do with any other Product that you offer. (**Setup | Accounting** | **Products and Services**.) So if one of the items you bill is a Consultant Hour, for example, and your standard price is US$ 50 per hour, you'd define Consultant Hour as a Product, with that default price.

System Setup > Accounting > Products and Services

Current Products and Services

Name	Default Price	Default Currency	Active
Consultant Hour	50.00	CAD	✓
Consultant Overtime Hour	75.00	CAD	✓
Director Day	1,200.00	CAD	✓
Support Unit	35.00	CAD	✓

Billing Rules

Billing Rules tell BlueCamroo how to convert the time you record on your Time Sheets into units of Product that you can put on client invoices. To set up Billing Rules, click **Setup | Accounting** | **Billing Rules**.

For each Grade of personnel (i.e. each Billing Grade, set up above), the Billing Rule defines how much logged time represents one unit of the related Product. So, in the example below, 1 hour of time logged by a person whose Billing Grade is 'Consultant' converts to 1 Consultant Hour.

System Setup > Accounting > Billing Rule

Current Billing Rule

Grade	Product	Equals (Time)	Total Each	Round	To	Max	Excess Time	Overtime Product
Consultant	Consultant Hour	1 Hour(s)	Day	Up	0.1 Hour(s)	8	Overtime	Cons. Overtime Hour
Director	Director Day	8 Hour(s)	Day	Up	2 Hour(s)	8	Discard	
Support	Support Unit	15 Minute(s)	Entry	Up	15 Minute(s)			

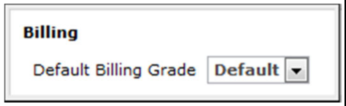
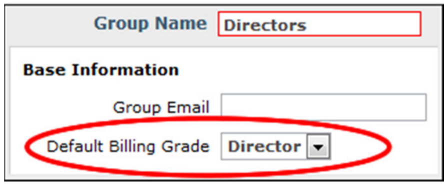
The additional settings of Billing Rules operate as follows:

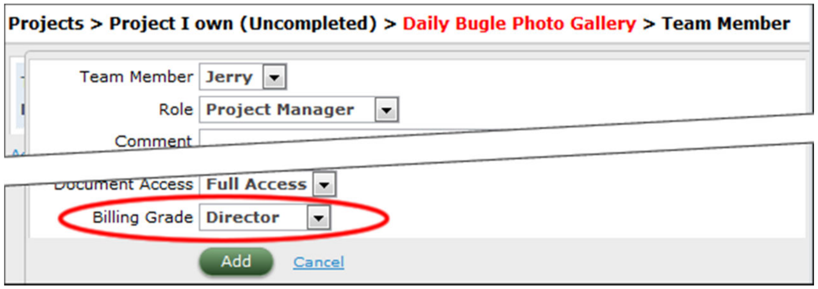
Total Each	Defines how time should be added up before being applied to Products. ***Entry*** means each individual logged time entry is converted to a number of Product units, which are then added. ***Day*** means that all the individual's logged time for the day is added together before the Product units are calculated.
Round To	Defines how time is rounded – ***Up***, ***Down*** or to the ***Nearest*** given number of minutes or hours. In the example given above, Consultants' time is rounded up to the next unit of 0.1 Hours (6 minutes); Directors' time is accumulated daily and rounded up to the next 2 hours (1/4 day).
Max	Indicates the maximum time that can be accumulated each Day. (Units are the same as the selected ***Equals (Time)*** Units).
Excess Time	Defines how time above Max is handled. Options are ***Discard:*** write off excess time; ***Accumulate:*** carry forward and bill on the next working day; and ***Overtime:*** charge at the **Overtime Product** Rate
Overtime Product	Product to use for billing excess time (above ***Max*** value). In the e

<u>User Billing Grade</u>

Let's take stock: so far BlueCamroo knows the Grades of personnel you bill for; the Units in which you bill time; your pricing; and how logged time for each grade of personnel is converted to billable time units. All that remains is to tell the system which Billing Grade applies to each User.

In fact, billing time is rarely that simple. A person may be billed in different Grades in different jobs, so BlueCamroo has FOUR ways to define User Billing Grades. These are listed in the next column, from the most general (applying to all Users) to the most specific (applying to a specific User on a specific Project). Note that the more specific data at each level overrides the more-general setting before.

<table>
<tr><td>Level 1</td><td>Setup | Company Defaults | Company Details
The System Default Billing Grade applies to all users / time where a more specific rule is not set.

</td></tr>
<tr><td>Level 2</td><td>Setup | Users and Groups | User Groups
If set, the User Group Default Billing Grade applies to all users in the Group who do not have a Billing Grade set at the User level (Level 3), and overrides the Default Billing Grade. Note that if a User is in multiple User Groups, the Billing Grade from the first listed Group will apply.

</td></tr>
<tr><td>Level 3</td><td>Setup | Users and Groups | Users
If set, the User Default Billing Grade applies to the individual User, and overrides the User Group and System Default Billing Grades.

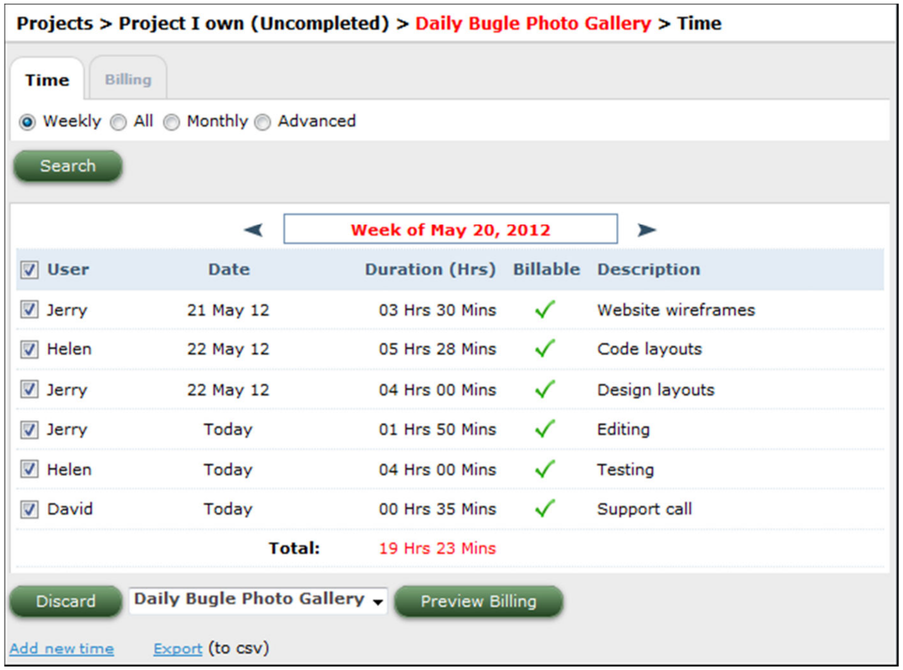
</td></tr>
<tr><td>Level 4</td><td>Projects | [Selected Project] | [Selected Team Member]
If set, the Project Team Member Default Billing Grade applies to the individual User in relation only to a specific Project, and overrides all other Default Billing Grades.

</td></tr>
</table>

13.3 Billing

Billing time has four major steps: Select Time; Preview Billing; Create Products; and Create Invoice.

Select Time

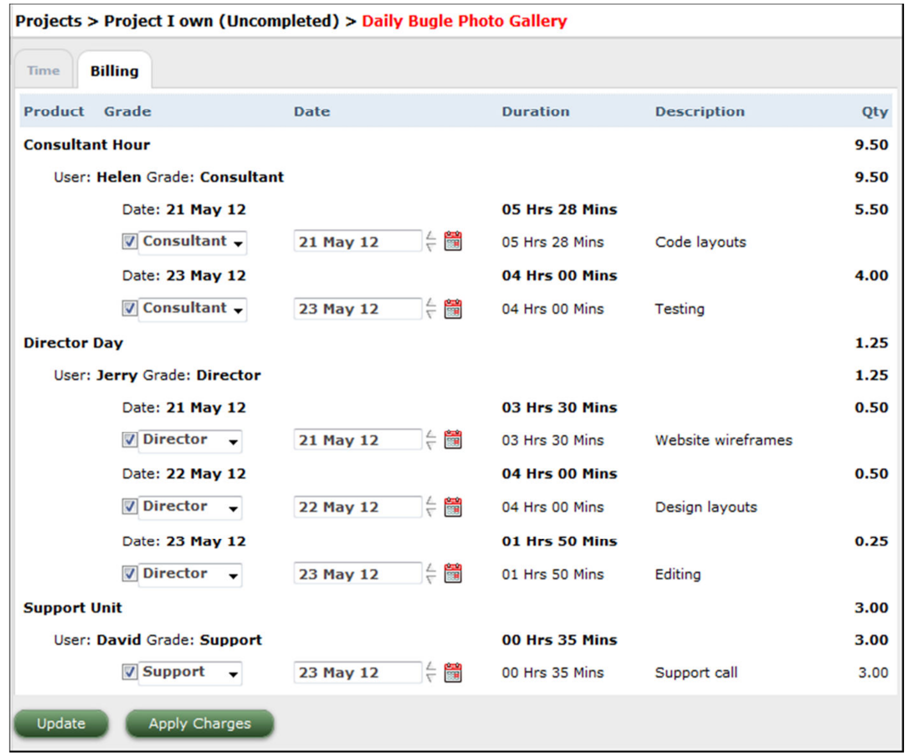
The first step is to view **Time** for the **Project** to be billed. Select the relevant Project, then click the **Time** button on the toolbar to display logged time. Select the checkboxes beside the time entries to be included in the current billing run.



Preview Billing

Having chosen the time entries to be billed, the next step is to Preview Billing. BlueCamroo uses the team members' Billing Grades and the Billing Rules to calculate how logged time should be mapped onto Products.

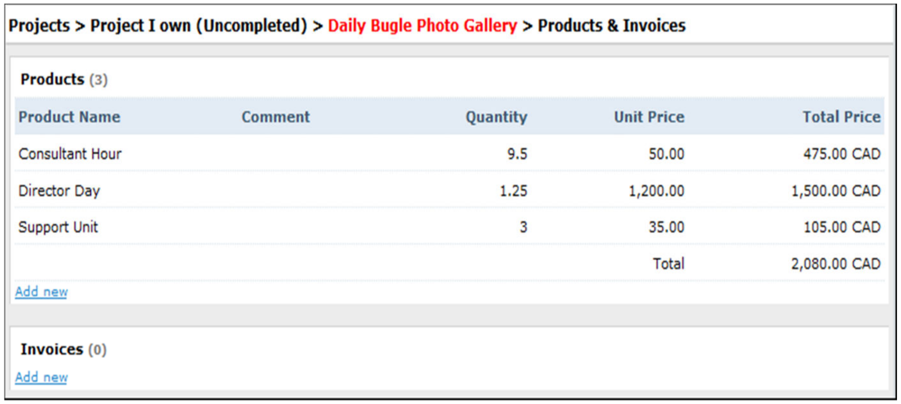
As the screenshot below shows, BlueCamroo organizes its results by Billing Grade, and within that by User and finally by date. The Billing Grades used are the most precise 'Default Billing Grade', worked out according to the four levels described in Section 13.2 above, however it is now possible to override those grades, for example if work done by a team member who normally bills ***Director*** grade was really quite simple and should more appropriately be charged at the ***Consultant*** rate. Make the required changes and click the **Update** button.



Notice how **Duration** is actual time expended, and **Qty** is the quantity of billable Product units to be charged. Looking at David's time on 23 May, for example, you can see how BlueCamroo has taken total time of 35mins and applied the rule to calculate every 15 minutes (or part thereof) as a 'support unit', so has calculated 3 support units.

Create Products

When you are happy with the billing preview, click the **Apply Charges** button. BlueCamroo now adds the billing Products into your Project, ready to be invoiced.



Projects > Project I own (Uncompleted) > Daily Bugle Photo Gallery > Products & Invoices

Products (3)

Product Name	Comment	Quantity	Unit Price	Total Price
Consultant Hour		9.5	50.00	475.00 CAD
Director Day		1.25	1,200.00	1,500.00 CAD
Support Unit		3	35.00	105.00 CAD
			Total	2,080.00 CAD

Add new

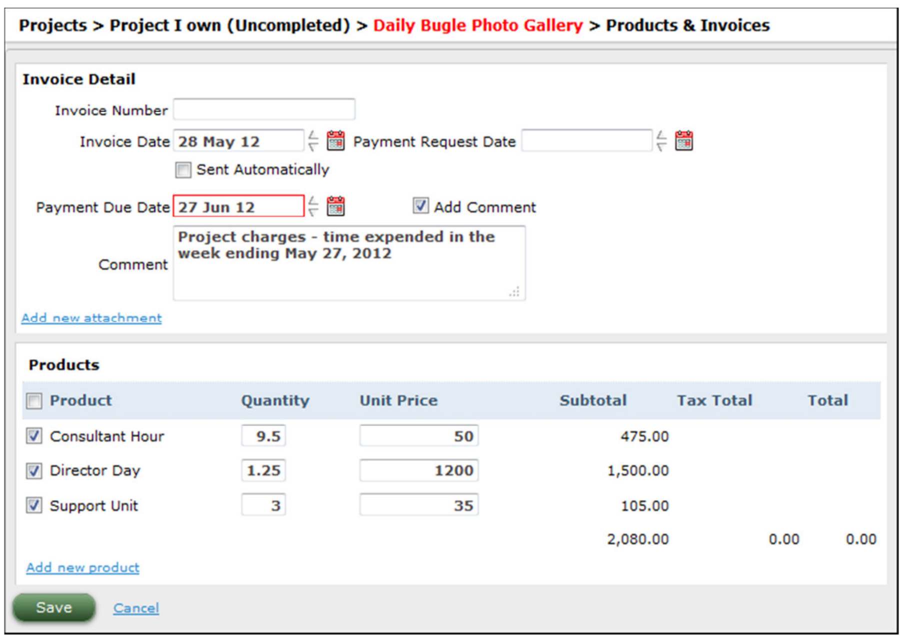
Invoices (0)

Add new

Should you wish to, you can now add comments to any of the items, which will appear on your Invoice.

Generate Invoice

From here, it's the normal process to generate an invoice. Simply add the Invoice, and select the Products you wish to bill for.



Projects > Project I own (Uncompleted) > Daily Bugle Photo Gallery > Products & Invoices

Invoice Detail

Invoice Number

Invoice Date 28 May 12 Payment Request Date

Sent Automatically

Payment Due Date 27 Jun 12 Add Comment

Comment: Project charges - time expended in the week ending May 27, 2012

Add new attachment

Products

Product	Quantity	Unit Price	Subtotal	Tax Total	Total
Consultant Hour	9.5	50	475.00		
Director Day	1.25	1200	1,500.00		
Support Unit	3	35	105.00		
			2,080.00	0.00	0.00

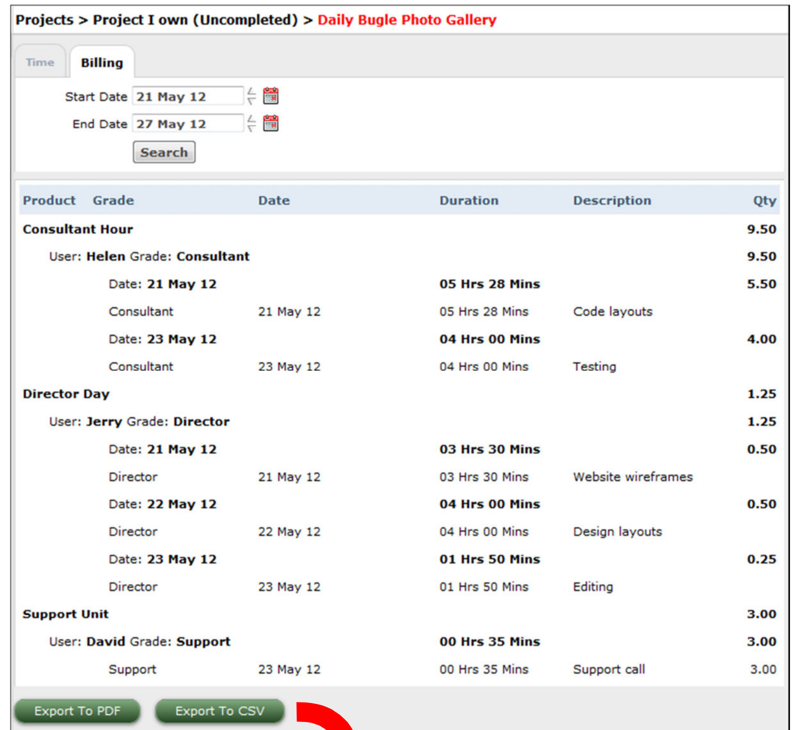
Add new product

Save Cancel

Do More

Tip: BlueCamroo lets you go back and review how you have applied time to a Project's billing (products). Simply click the **Time** button on the toolbar, then select the Billing tab and search for the date range of logged time that you want to report.

You can export the time detail to PDF or CSV and use it for additional analysis, or to attach as supporting information with your invoice.



Projects > Project I own (Uncompleted) > Daily Bugle Photo Gallery

Time | Billing

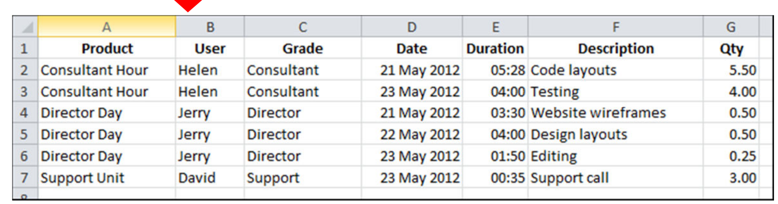
Start Date 21 May 12

End Date 27 May 12

Search

Product	Grade	Date	Duration	Description	Qty
Consultant Hour					9.50
User: Helen Grade: Consultant					9.50
Date: 21 May 12			05 Hrs 28 Mins		5.50
	Consultant	21 May 12	05 Hrs 28 Mins	Code layouts	
Date: 23 May 12			04 Hrs 00 Mins		4.00
	Consultant	23 May 12	04 Hrs 00 Mins	Testing	
Director Day					1.25
User: Jerry Grade: Director					1.25
Date: 21 May 12			03 Hrs 30 Mins		0.50
	Director	21 May 12	03 Hrs 30 Mins	Website wireframes	
Date: 22 May 12			04 Hrs 00 Mins		0.50
	Director	22 May 12	04 Hrs 00 Mins	Design layouts	
Date: 23 May 12			01 Hrs 50 Mins		0.25
	Director	23 May 12	01 Hrs 50 Mins	Editing	
Support Unit					3.00
User: David Grade: Support			00 Hrs 35 Mins		3.00
	Support	23 May 12	00 Hrs 35 Mins	Support call	3.00

Export To PDF Export To CSV



	A	B	C	D	E	F	G
1	Product	User	Grade	Date	Duration	Description	Qty
2	Consultant Hour	Helen	Consultant	21 May 2012	05:28	Code layouts	5.50
3	Consultant Hour	Helen	Consultant	23 May 2012	04:00	Testing	4.00
4	Director Day	Jerry	Director	21 May 2012	03:30	Website wireframes	0.50
5	Director Day	Jerry	Director	22 May 2012	04:00	Design layouts	0.50
6	Director Day	Jerry	Director	23 May 2012	01:50	Editing	0.25
7	Support Unit	David	Support	23 May 2012	00:35	Support call	3.00

14. Recording and Managing Personal Expenses

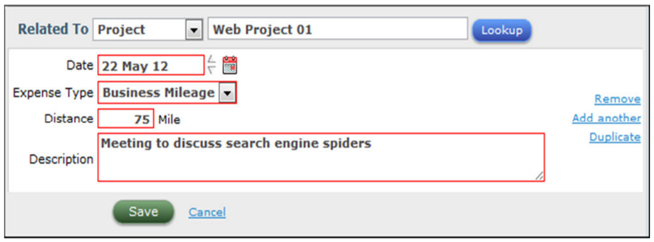
14.1 Overview

In addition to keeping track of time we spend on Projects and client work, many of us – particularly in Sales roles – need to keep track of personal expenses. BlueCamroo helps out with a simple Expense Logging and Approvals process.

14.2 Creating and Completing Expense Sheets

To create your first Expense Sheet, select **Expenses** from the Explorer Bar, then click the button next to **My Expense Sheets.**

Go ahead and input the date range for your Expense Sheet, and any comment you wish to add, then begin adding expenses. Your Expense Sheet will start to look like the example below.



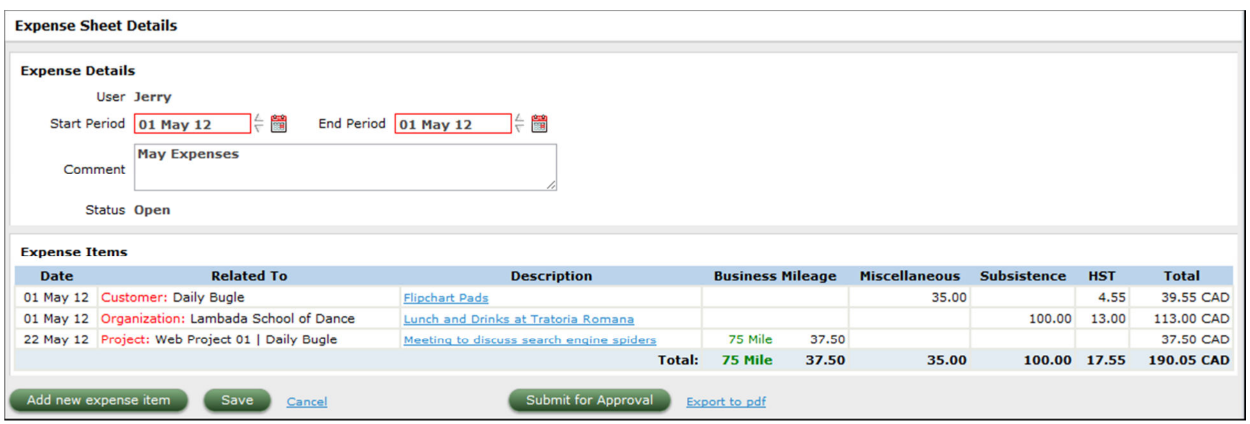
14.3 The Approvals Process

When all your **Expenses** for the period of the **Expenses Sheet** are input and checked, click the **Submit for Approval** button. BlueCamroo now handles the Approval process, notifying your Expense Approver and – when the claim is approved – notifying the person who makes payments.

14.4 Expenses Setup

BlueCamroo provides a number of Setup Options to enable you to tailor Expenses handling for your own organization. These are as follows:

- In the **Accounting** section of Setup (**Setup | Accounting**), define the **Expense Types** that Users can select when adding Expenses.
- Also in the **Accounting** Setup, **Expense Price Books** allow you to manipulate the way Expense Types will be made available to Users. (Refer back to Products and Price Books in Section 11.2 if necessary. Expense Types and Expense Price Books follow the same concepts.)
- In **Users and Groups** Setup (**Setup | Users and Groups**, define for each User their ***Default Expense Price Book***.
- Also In **Users and Groups** Setup, define for each **User Group** Which Group(s) or Individual(s) may approve expenses and effect payments for that Group of Users. (Approvers may also be defined at the individual User level, but we generally recommend setting these at the User Group level unless this is impracticable.)
- In **Automation** Setup (**Setup | Automation**), choose Email Template to review and update 5 standard Email Templates that handle notifications for Expenses, namely: **Expense Submit Notification**; **Expense Approval Notification**; **Expense Decline Notification**; **Expense Submit to Pay Notification**; and **Expense Paid Notification**.



Expense Sheet Details

Expense Details

User Jerry

Start Period 01 May 12 End Period 01 May 12

Comment May Expenses

Status Open

Expense Items

Date	Related To	Description	Business Mileage		Miscellaneous	Subsistence	HST	Total
01 May 12	Customer: Daily Bugle	Flipchart Pads			35.00		4.55	39.55 CAD
01 May 12	Organization: Lambada School of Dance	Lunch and Drinks at Tratoria Romana				100.00	13.00	113.00 CAD
22 May 12	Project: Web Project 01 | Daily Bugle	Meeting to discuss search engine spiders	75 Mile	37.50				37.50 CAD
		Total:	75 Mile	37.50	35.00	100.00	17.55	190.05 CAD

Add new expense item · Save · Cancel · Submit for Approval · Export to pdf

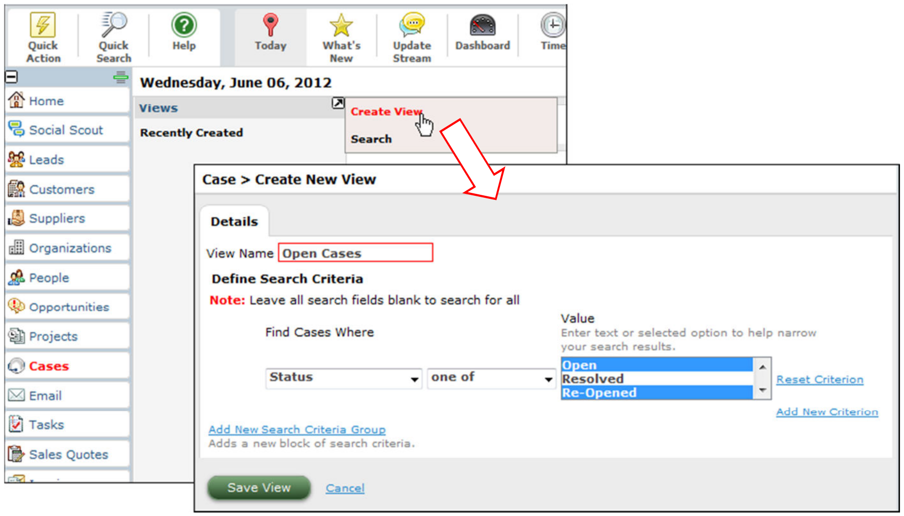
14.5 Tip: Handling Rechargeable Expenses

Unlike Time, **Expense** records cannot be marked Billable / Non-Billable. An approach we have seen many Users take is to create two Expenses Sheets for each Period, with Descriptions indicating ***Rechargeable*** and ***Non-Rechargeable***. This works well, as the BlueCamroo system is perfectly happy with different Expenses Sheets overlapping in the same time periods.

15. Creating Reports and Dashboards

15.1 Stop! Do you need to create a report?

Many new users who come to BlueCamroo after using other systems immediately want to create lots of reports; because that's what they were used to doing in their old system. Often, a **View** is actually the more convenient tool. For example, instead of creating a Report that lists ***Open Cases*** to ensure you have followed everything up, create a View:



15.2 Reports

Reports are accessed from the **Reports** option on the Explorer Bar, and are grouped into three sets: **My Reports**; **Shared Reports**; and **Pre-Defined Reports**.

Pre-Defined Reports

Pre-Defined Reports are created by BlueCamroo, and included in every BlueCamroo workspace. (This isn't the kind of manual where we'd even try to talk through every report, so simply dive in and have a play to see which of these will be useful to you!)

My Reports

In addition to the Pre-Defined Reports provided by BlueCamroo, you can create and share your own reports.

To start creating a Report, simply hover over the May Reports option in the Explorer Bar and click the Add button. The screen shots on the following page illustrate the steps to create a Report; full details of each step can be had by clicking the button.

Note: Reports respect the Permissions of the user that runs the report, so bear in mind that if you create a report and share it with other users, what they see when they run the report may be different to what you see.

Shared Reports

As indicated above, Shared Reports are reports created by another system user (often the System Administrator) and shared with you.

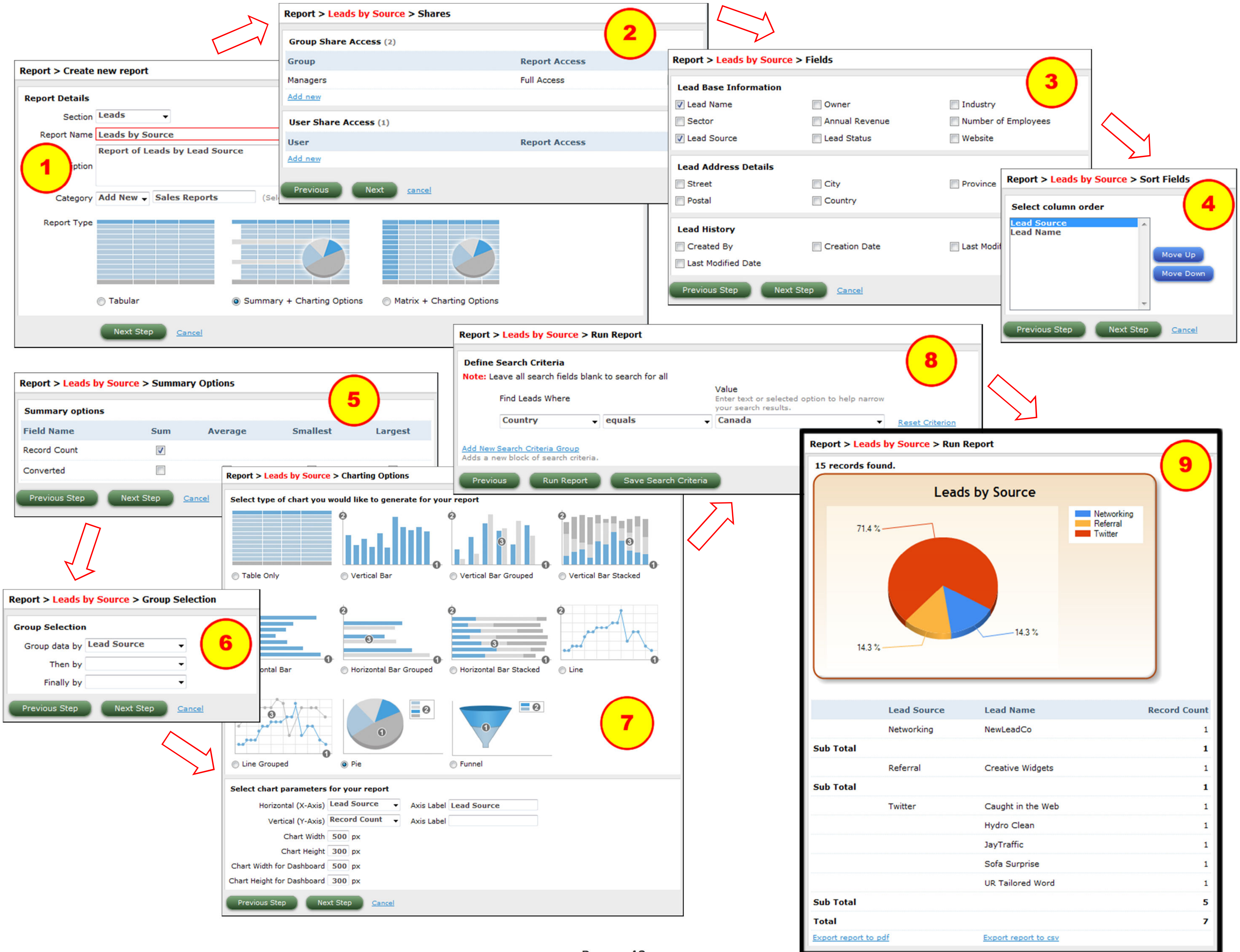
Whether you can modify any details of the report will depend on the permissions set by the User who designed the Report.

15.3 Exporting Reports

Most reports can be exported, either to a PDF format (for sharing and re-printing), or to a CSV ("Comma Separated Values") file. Reports are in fact the most powerful and efficient way to Export data from BlueCamroo.

15.4 Dashboards

If you have created reports that include Charts and that you would like to see regularly, you can include the Charts in a Dashboard. Click the Dashboard button on the Toolbar in your Home page to set up your Dashboard.

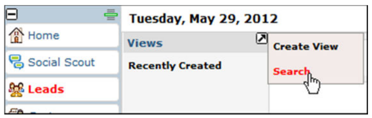

1
Report > Create new report
Report Details
Section Leads
Report Name Leads by Source
Report of Leads by Lead Source
Category Add New Sales Reports
Report Type
Tabular
Summary + Charting Options
Matrix + Charting Options
Next Step Cancel
2
Report > Leads by Source > Shares
Group Share Access (2)
Group Report Access
Managers Full Access
Add new
User Share Access (1)
User Report Access
Add new
Previous Next cancel
3
Report > Leads by Source > Fields
Lead Base Information
Lead Name Owner Industry
Sector Annual Revenue Number of Employees
Lead Source Lead Status Website
Lead Address Details
Street City Province
Postal Country
Lead History
Created By Creation Date
Last Modified Date
Previous Step Next Step Cancel
4
Report > Leads by Source > Sort Fields
Select column order
Lead Source
Lead Name
Move Up
Move Down
Previous Step Next Step Cancel
5
Report > Leads by Source > Summary Options
Summary options
Field Name Sum Average Smallest Largest
Record Count
Converted
Previous Step Next Step Cancel
6
Report > Leads by Source > Group Selection
Group Selection
Group data by Lead Source
Then by
Finally by
Previous Step Next Step Cancel
7
Report > Leads by Source > Charting Options
Select type of chart you would like to generate for your report
Table Only
Vertical Bar
Vertical Bar Grouped
Vertical Bar Stacked
Horizontal Bar Grouped
Horizontal Bar Stacked
Line
Line Grouped
Pie
Funnel
Select chart parameters for your report
Horizontal (X-Axis) Lead Source Axis Label Lead Source
Vertical (Y-Axis) Record Count Axis Label
Chart Width 500 px
Chart Height 300 px
Chart Width for Dashboard 500 px
Chart Height for Dashboard 300 px
Previous Step Next Step Cancel
8
Report > Leads by Source > Run Report
Define Search Criteria
Note: Leave all search fields blank to search for all
Find Leads Where
Value
Enter text or selected option to help narrow your search results.
Country equals Canada
Reset Criterion
Add New Search Criteria Group
Adds a new block of search criteria.
Previous Run Report Save Search Criteria
9
Report > Leads by Source > Run Report
15 records found.
Leads by Source
Networking
Referral
Twitter
71.4 %
14.3 %
14.3 %
Lead Source Lead Name Record Count
Networking NewLeadCo 1
Sub Total 1
Referral Creative Widgets 1
Sub Total 1
Twitter Caught in the Web 1
Hydro Clean 1
JayTraffic 1
Sofa Surprise 1
UR Tailored Word 1
Sub Total 5
Total 7
Export report to pdf
Export report to csv

16. Working with Groups of Records

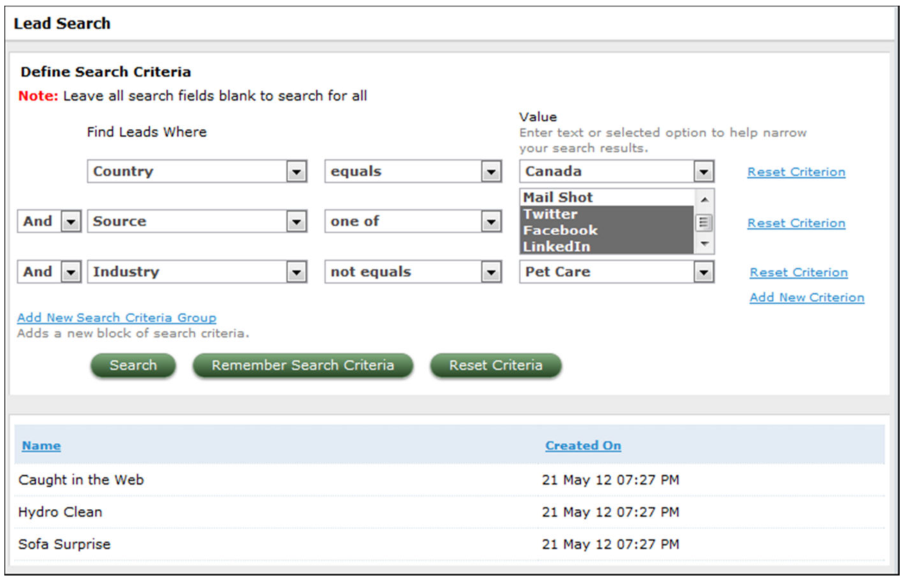
In this User Guide, we've focused mostly on working with records one-at-a time. In this Section we'll look briefly at the ***Mass Processing*** tools BlueCamroo provides to let you work with whole groups of records.

16.1 Advanced Search

Fundamental to all the Mass Processing tools is the ability to **Search** and select records according to relevant criteria. To quickly locate a record, you're likely to simply browse to the data you require, or use the **Quick Search** tool from the main toolbar, however for advanced searches you'll use the Search feature provided for each main data type. To access this, click the pop-out menu



button in the Views pane when browsing any data from the left Explorer Bar and click to display the search form:

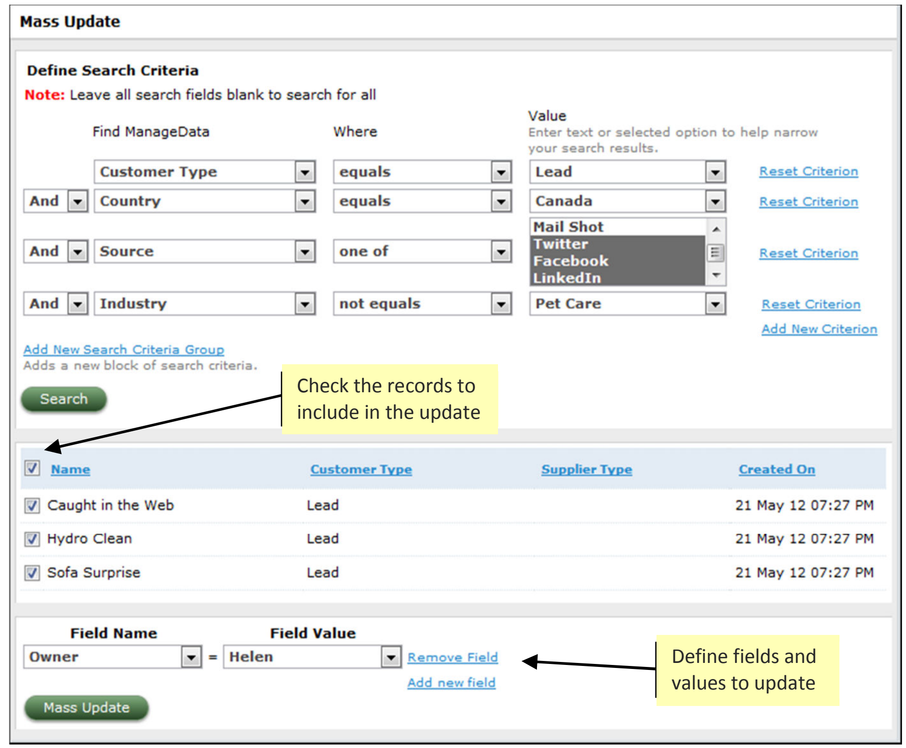


The Search form allows you to build searches that combine multiple criteria. Note that where a Search includes multiple rows of criteria that are joined with a mixture of **AND** and **OR** conditions, the **AND**ed criteria are evaluated first. This principle can be overridden if necessary using **Search Criteria Groups** (see the Search Help pages for further information).

16.2 Mass Data Processes

The **Mass Data** Processes are accessed via a sub-menu under the **Manage Data** button on the Home Page toolbar.

Mass Update allows you to update multiple records at once. Complete the Search Form to return records that meet your chosen criteria; check the records that you wish to update, then define the field(s) to update and new value(s) to apply. In this example, ownership of the selected records is being transferred:



Mass Delete follows the same process as Mass Update: 1. Search; 2. Check required records; 3. Process Data. Deleted records are moved to the Recycle Bin, from where they can be restored or deleted permanently. Finally, **Mass Share** follows the same process to create or delete Shares.

17. Email Marketing

17.1 The Campaign Manager

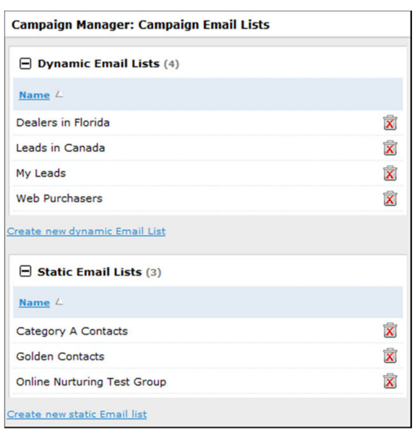
Email newsletters are a proven method of keeping your business front-of-mind with your customers and prospects. BlueCamroo helps you to do this with its integrated **Campaign Manager** module. With the Campaign Manager, you can:

- ***Send a personalized email Newsletter*** to some or all of the People in your BlueCamroo database; ***schedule*** an email to send later; or prepare an email to send in response to certain ***triggers***.
- ***Create multi-part email campaigns***, to send a series of emails at pre-defined intervals.
- ***See reports*** of open rates, unsubscribes, and click-thrus.
- ***Integrate Campaign/Newsletter Email history*** to the individual Person or Contact record, just as you do with standard email messages.

The Campaign Manager is accessed via the **Email Marketing** button from the Home Page toolbar.

17.2 Managing Lists

Using the Campaign Manager, you send your email Newsletters to people on your **Email Lists**. These can be either of two types:



- **Dynamic Email Lists** are essentially saved searches. You define your search criteria, and all People/Contacts that match the criteria ***when the campaign is sent*** will be included in the mailing.
- **Static Email Lists** are also created from a search, but once individuals are added to the list it stays the same unless you manually add or remove people. The search is ***not*** re-run when the campaign is sent.

17.3 Creating Newsletter Templates

You will probably want your email newsletters to look more 'styled' than just a plain text email. The Campaign Manager allows you to create **Email Templates** that you can use in your Campaigns to ensure a consistent appearance.

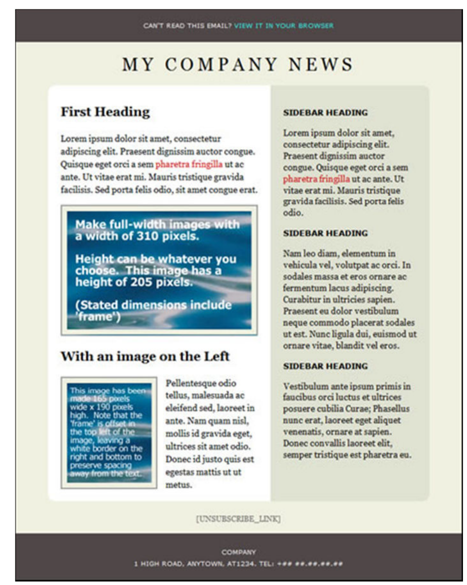
Click on the **Setup** button in the Campaign Manager toolbar, and then choose **Email Templates** to create your own templates.

> ***Tip:*** Keep your designs simple; test well and often in lots of different email systems. Your readers will view your emails on the web; in Outlook; on their smartphones and tablets. Many email systems strip out images unless your reader actively chooses to see them, so you need to think about how your design will look both with and without any images you use.

Using BlueCamroo Email Templates

We have created a small number of Campaign Email Templates that you can use and adapt, or simply study as examples for building your own templates.

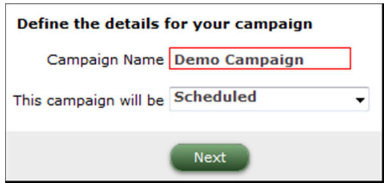
Log in to your **Account Management area** at www.bluecamroo.com using your workspace login details and choose **Select Email Templates** to view the available templates and copy them to the Campaign Manager in your BlueCamroo workspace.



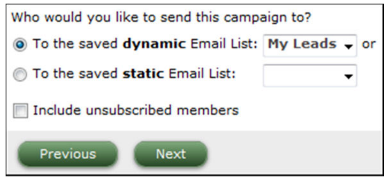
17.4 Creating Campaigns

A Campaign consists of an Email **Newsletter**, or series of Newsletters, sent to an **Email List**. There are 5 steps to creating your Campaign:

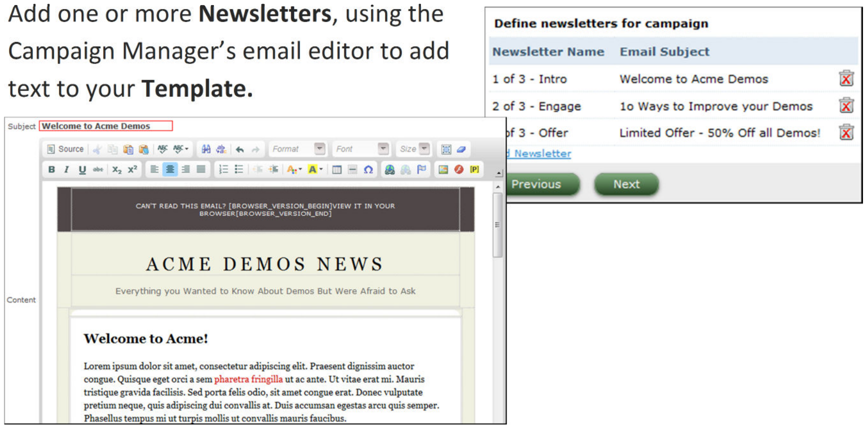
1. In the Campaign Manager section, select the **Active Campaigns** button from the toolbar, then click **Add new campaign.** Give your Campaign a name.



2. Pick the **Email List** that you wish to target. Note that each Campaign can be sent to only one Email List, but you can copy Campaigns to quickly send to additional lists.



3. Add one or more **Newsletters**, using the Campaign Manager's email editor to add text to your **Template.**



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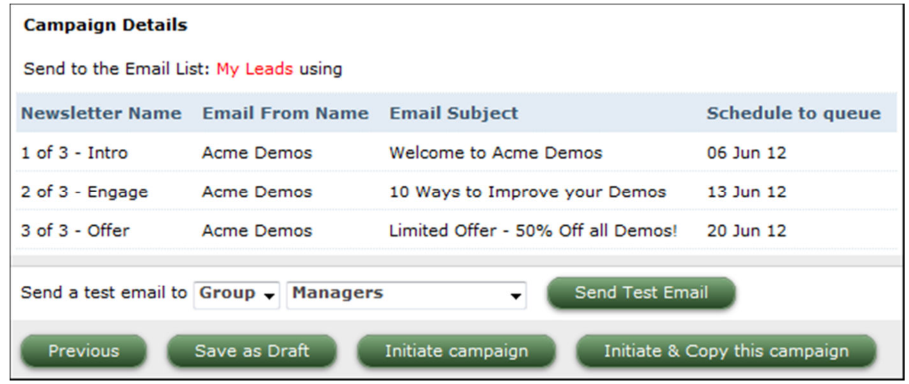
4. Set **Campaign Scheduling** options. These can include: ***Immediate*** – to send a single Newsletter out right away; ***Scheduled*** – to send on specified dates/times; or ***triggered*** – to send at particular intervals after an event such as adding a Contact to BlueCamroo.

5. **Test the Campaign** by sending to yourself and colleagues using as many email accounts as possible, e.g. Gmail; AOL; Yahoo; Hotmail; Notes, and view via Webmail; Outlook; Smartphone; iPad; etc.



When you are confident the Campaign is set up correctly and that the Newsletters are displaying the way you want (check with and without images enabled), **Initiate the Campaign** to place it on the queue for sending.

17.5 Measuring Results

BlueCamroo tracks – and reports on – ***Opens***, ***Click-thrus*** and ***Unsubscribes*** on all your Campaign Email. To view Campaign Reports, click the **Reports** button within the Campaign Manager Toolbar.

Important: Like all email marketing systems, BlueCamroo tracks Opens by inserting a very small (1 pixel) image file in your campaign emails. Many recipients will view your emails with Images disabled in their email client. These Opens, and also emails read in the 'preview' window in Microsoft Outlook, are not tracked. The Open Rate you see reported will therefore never reflect all Opens, and is best used to compare the relative performance of different campaigns to similar lists.

18. Customizing BlueCamroo for your Organization

18.1 It's your System!

BlueCamroo is designed to be highly flexible, allowing you to customize the system to fit your individual organization. Whether it's automating processes; adding data tables; or just personalizing your color scheme, BlueCamroo puts you in control.

Throughout this User Guide, we've covered many areas that could be described as "Customization", such as setting up your **Products and Services** catalog (Section 11); defining your time **Billing Rules** (Section 13); or creating ***Sales Opportunity Searches*** to harvest Sales Leads from Social Networks (Section 5). In this section, however, we'll specifically review all the major configuration options in BlueCamroo, and discuss how they help you to "***Do more with BlueCamroo***".

We'll point you to the relevant Setup areas, but we won't go "screen by screen" through each setup. Just click the button in any Setup area for all the detail.

18.2 Basic Settings

Company Defaults setup (**Setup** | **Company Defaults**) allows you to define basic settings for your BlueCamroo workspace, including:

Company Details: Organization Name and Address; Default User Access Rights (see Appendix 1); Region and Time Zone; Default Billing Grade and Default Support Email Recipient for emails to 'support@' from non-customers.

Supported Languages: List of Languages for client communication. A full set of Email Templates and other relevant documents can be configured for each Supported Language.

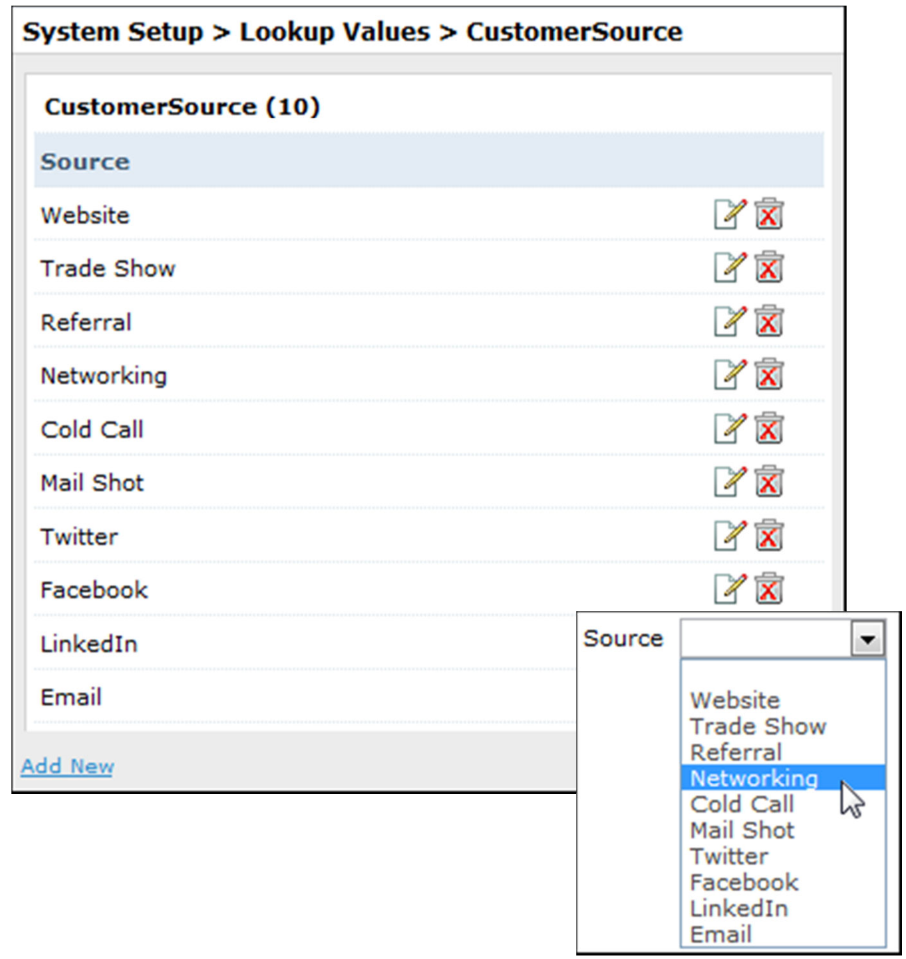
Organization Preferences: Calendar preferences, including Working Hours and Date/Time Format. Default preferences for which sub-page to show in each major system section. Home Page date ranges. (Each User can set personal defaults.)

UI Customization: Define Logo for Log-in Page and Templates, and a 'favicon' to display in browser tabs. Choose Theme (color settings).

18.3 Lookup Values

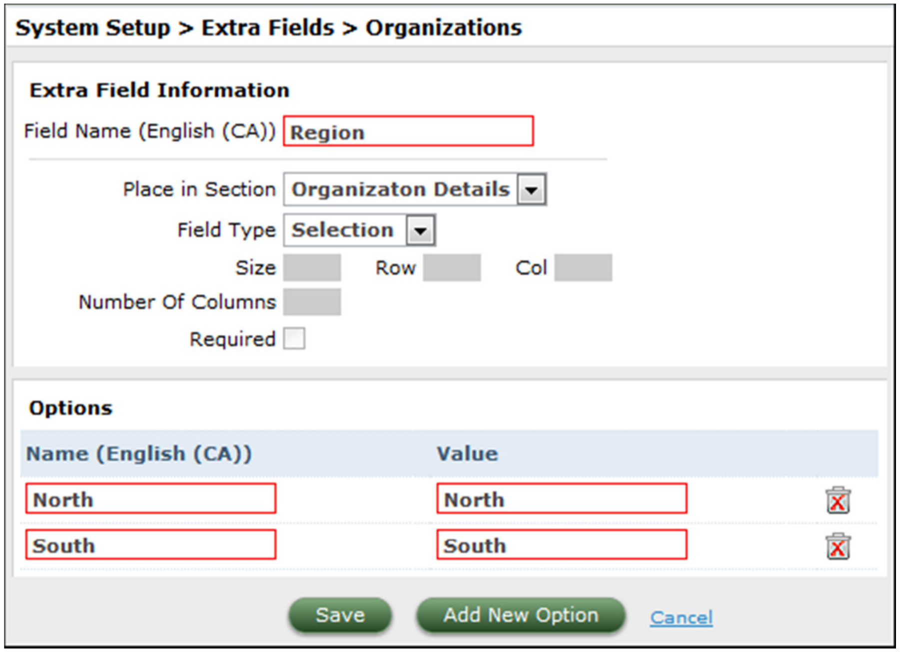
A number of BlueCamroo's standard fields – such as **Titles**; **Lead Statuses**; **Customer Types** and **Opportunity Phases** – are entered by selecting values from a drop-down list.

Go to **Setup | Lookup Values** to configure your own choice of drop-down list **Lookup Values**.



18.4 Extending your Data

If you wish to store data that doesn't "fit" in the pre-defined BlueCamroo data fields, you have the option to extend your data with either **Extra Fields** or **Extra Data Objects**, or both!



Extra Fields

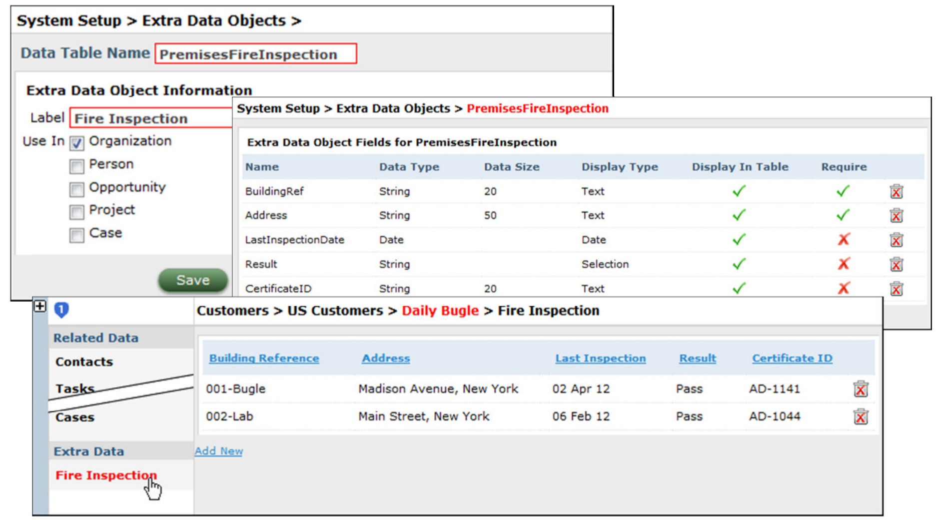
Extra Fields can be added to all core system Data Objects, i.e. **Users**; **Organizations**; **People**; **Contacts**; **Opportunities**; **Projects**; **Cases**; and **Time Sheets**. Note that Extra Fields associated to a Lead may be retained on conversion to Organization + Contact; Extra Fields associated to an Opportunity may be retained on conversion to a Project.

BlueCamroo supports six types of Extra Field: Text; TextArea; Checkbox; Radio; Selection and Date.

Extra Data Objects

Extra Data Objects are like Extra Fields, only more so! Whereas each Extra Field allows you to record a single extra piece of information for each record of base system data, an Extra Data Object allows you to add a whole additional table full of data to each base system data record.

For example, imagine your business is Fire Safety, and that you offer your customers ("Organizations") annual fire inspections. You could create an Extra Field for Organizations and call it something like ***Date Next Inspection Due***. That's fine, but what if your customer has more than one building to be inspected? What if each inspection takes place at a different time in the year; or you want to store a ***Safety Certificate Number*** for each building? In this case, the limitation that you can only store one value in each Extra Field for each record would be a real problem. The solution is to create an Extra Data Object instead.



18.5 Countries, Currencies and Taxes

Countries, Currencies and Taxes are defined in the Accounting section of Setup (**Setup** | **Accounting**):

Supported Currencies defines your list of currencies in which you quote or invoice your services, and also your **Default Currency**.

Tax Names defines your list of Sales Taxes that you apply (in any country where you do business). Note that Taxes must also be selected within the Price Book (see next page) to be applied.

Countries Serviced defines the countries in which you do business; and also the applicable Sales Tax and Sales Tax Rate. Click on any **Country** to view the **Regions** within that Country. (Sales Tax can also be set at an individual Region basis if necessary.)

Note: This list is also used for Country and Region (e.g. State; Province; County) lookups whenever you add address details for Lead, Organization or Contact data, so if you are wanting to add clients in a particular Country or Region and BlueCamroo does not offer you that option; add it here.

18.6 Products and Pricing

Products and Pricing are also defined in the **Accounting** section of Setup (**Setup** **| Accounting**):

- **Products and Services** defines your Product Catalog, and your default price levels.
- **Price Books** enable modified pricing (including alternate currencies) for particular customer groups, and also define the Tax Rates that apply.

(Refer back to Page 30 for a detailed explanation of Products and Price Books.)

18.7 Quoting, Billing and Receiving Payment

BlueCamroo allows you to generate **Sales Quotes** and **Invoices**; to email these directly to Organizations; and to give clients the ability to respond to Sales Quotes and to pay Invoices online. To fully set up these features, review the following areas:

In Accounting Setup (**Setup** **| Accounting**):

- the **Global Invoice Template** allows you to customize your invoices
- the **Global Payment Request Template** allows you to customize your Payment Requests
- **Global Invoice Reminders** allows you to add automated payment reminders
- the **Sales Quote Template** allows you to customize your Sales Quotes.
- if you also intend using BlueCamroo's Online Payment capabilities, the **Payment Without Login Templates** option allows you to customize the payment page.

(Note that the Global Invoice and Payment Request Templates and Global Invoice Reminders may be overridden by Project Templates. See Appendix 1 for details.)

In Automation Setup (**Setup** **| Automation**), the **Email Template** option lets you customize the system emails that relate to Sales Quotes and Invoices. These are:

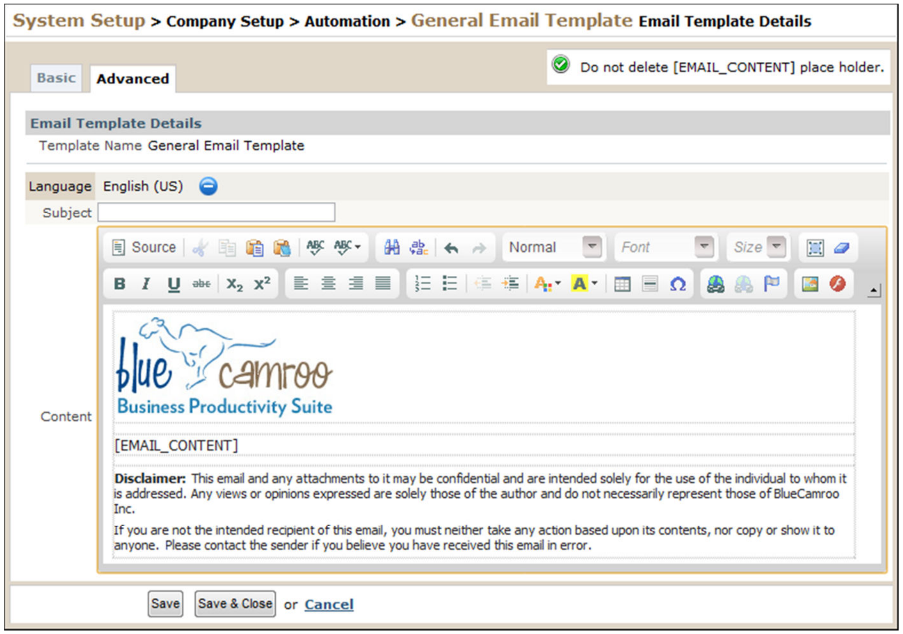
- **Invoice Notification** – To your customer, attaching the Invoice.
- **Payment Request Notification** – To your customer, attaching the Payment Request.
- **Sale Quote Notification** – To your prospect, attaching the Sales Quote.
- **Sale Quote Accept** – To you, advising your client has Accepted a Sales Quote online (see below).
- **Sale Quote Decline** – To you, advising your client has Declined / Commented your Sales Quote.
- **Payment Notification** – To you, advising Payment has been made online.

18.8 Automating your Business Processes

Email Templates

BlueCamroo has a large set of process emails that it sends, for example when a Task is assigned, or when you ***Notify*** a co-worker about a document you've just uploaded. When your Workspace was created, all these emails were set with default content that suits most businesses, but you can update any email to be more particular to your business. Email Templates can be found in the **Automation** section of Setup: **Setup** **| Automation** | **Email Template**.

Tip: All emails make use of the **General Email Template**. Edit this Template only to update your general Email Disclaimer or other text / logo etc that you wish to appear in all emails your organization sends from BlueCamroo.



Project Templates

If you provide the kind of services that involve going through pretty much the same steps for each client, Project Templates enable you to define "***the way we do things around here***" for each type of Project, and also save a load of time when creating each new Client Project.

Click **Setup | Automation** | **Project Templates** and explore the sample Project Template that has been provided in your BlueCamroo workspace.

Project Templates allow you to pre-define:

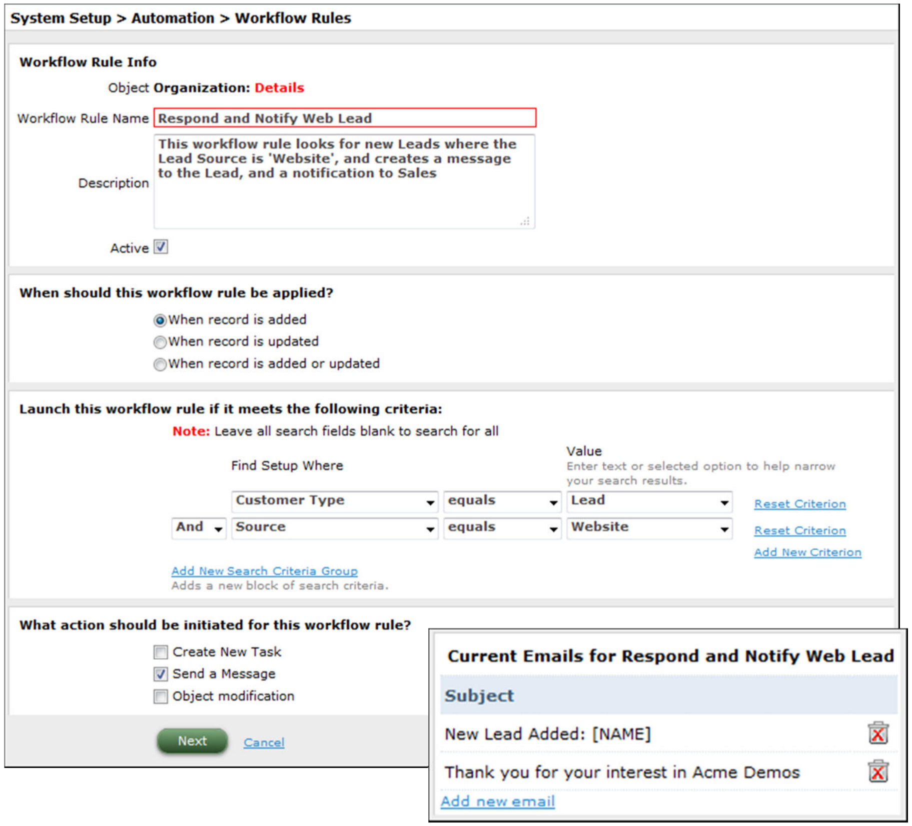
- **Products** – The Products and Services included in your Project. Note this is particularly helpful if you are mostly using Projects for Invoicing, as you can then define a Project Template for each major service line, and create Customer 'Orders' just by generating a new Project from the Template.
- **Stages, and Tasks within Stages** – This is the most-used part of Project Templates, allowing you to define all the steps and accountabilities for each type of Project up-front, and ensure every Project follows your defined process. Stages can also be defined as requiring Client Sign-Off and/or Invoicing.
- **Team Members** – Particularly helpful if you always use the same team for certain kinds of job.
- **Invoice Template** – Override the Global Invoice Template.
- **Invoice Reminders** – Override the Global Invoice Reminders.

Tip: Setting up Project Templates is pretty straightforward. Properly defining your optimum project processes and steps, however, can be much more challenging. Expect to spend about 10x as long mapping out your ideal process on paper and validating it with your team as you do entering the Project Template in BlueCamroo (but you only have to do it once!)

Workflow Rules

Workflow Rules (**Setup | Automation** | **Workflow Rules**) allow you to define certain ***Actions*** that the system will perform when particular criteria ("Triggers") are met. These Actions include:

- **Creating Tasks** – for example for a sales person to follow up a newly-added Lead
- **Sending Email** – whether to Contacts in the system, or to Users
- **Changing Data Values** – such as re-setting Status flags, etc
- **Sending an Invoice** – to automatically invoice all or part of a Project value under defined conditions.



18.9 Integration

BlueCamroo currently integrates with other systems in three specific areas: Lead Capture; Accounting; and Payment Processing.

In Automation Setup (**Setup | Automation**), the **Web-to-Lead Setup** option lets you create inquiry forms to place on your website, blogs etc. (Consider combining Web-To-Lead with Workflow Rules to create automated responses and follow-up actions when visitors to your website complete your inquiry form.)

In Accounting Setup (**Setup | Accounting**), the **Software Setup** option allows you to set up integration with **Quickbooks**, so that Invoice and Payment details can be posted directly from BlueCamroo to Quickbooks.

Also in Accounting Setup, the **Payment Processor** option allows you to input details of your payment processor account to collect your invoices directly through BlueCamroo. At present BlueCamroo supports **Paypal** (Website Payments Standard and Pro versions), and **Moneris**.

In the coming months, BlueCamroo will add connections for other Accounting Systems and Payment Processors, and will release a full API ("Application Programming Interface") to allow integration to any external system.

Appendix 1 – Managing Users and Permissions

Overview

BlueCamroo affords you very precise control over the data that individual Users can see, and what they can do with that data. But if you are working in a small team and need less tight controls, then you also have the choice to operate with more “open” permissions.

All User and Permission setups are contained in the **Users and Groups** Setup section (**Setup | Users and Groups**).

Users

Everyone in your team that you want to use BlueCamroo needs to be set up as a **User**. (It is possible and permitted for individuals to share a user access, however they will then be sharing the same Task list, Calendar, Inbox etc, so this is rarely convenient.)

Note: To ensure data integrity, Users cannot be deleted after they are associated to any records in the system. When Users leave your business, they should simply be marked ‘inactive’. This prevents any log-in by that user, and returns their licence count to the pool for use by other new users.

User Groups

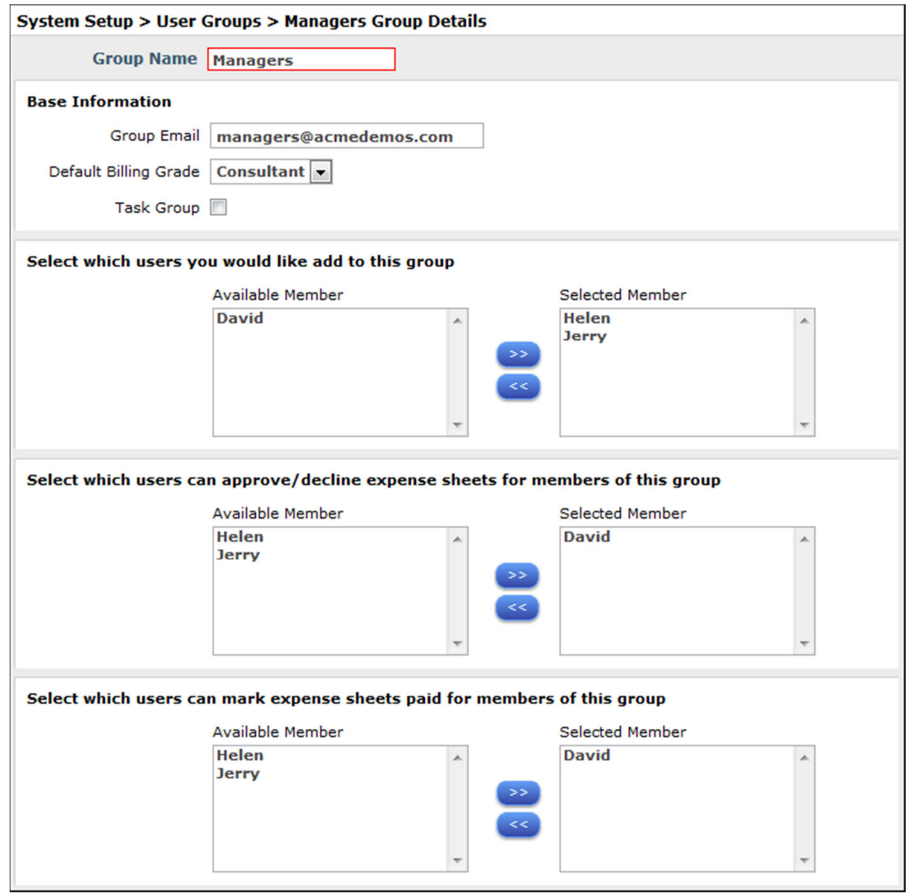
You may define as many **User Groups** as you wish. Users may be added to as many Groups as you choose, or to none.

There are three default User Groups that are created by BlueCamroo when your Workspace is first set up (these may not be deleted):

- **Expense Approver** – BlueCamroo has a built-in personal expense logging and claim process (see Section 14). Users added to this Group are authorized to approve Expenses for other Users.
- **Expense Payer** – Approved Expense claims will be routed to members of this Group for payment. Members of the Expense Payer Group can mark an expense claim “paid”.
- **System Administrators** – System Administrators have unrestricted permissions to all parts of BlueCamroo, including to the Setup area. (An exception is “To Do Lists”, which are personal to each User).

User Groups are the most convenient method to manage Permissions if you will be running a tightly controlled scheme of permissions.

Note: User Groups also support other special functionality, including Billing (see Section 13.2) and Group Tasks (Section 6.6).



Permissions

For any user / data combination, BlueCamroo has three levels of Permission:

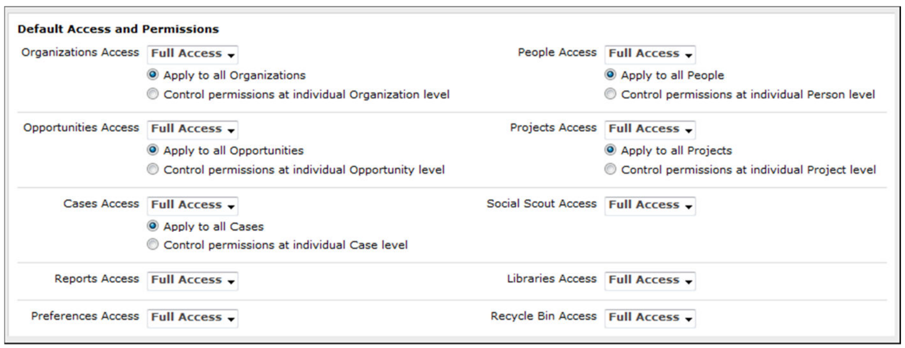
- **No Access** – The User cannot see or work with the data.
- **View Only** – The User can ***View*** the Data, but cannot update.
- **Full Access** – The User can ***View*** and ***Add/Update*** the data.

Permissions are defined for the whole Organization (all Users of the BlueCamroo workspace); at the User Group level, and at other levels besides. The following sections detail all levels where Permissions may be set.

Settings at each level override those at the previous level.

Level 1 – Company Details

In the **Company Defaults** Setup section, the **Company Details** page includes the first level of Default Access Rights.



The drop-downs allow you to set the chosen permission for each Section. Note that if permission is set to ***No Access***, the relevant section will not display at all – e.g. if 'Default Case Access' is set to ***No Access***, there will be no Cases item displayed on the explorer bar, and 'Cases' will be removed from other sections' explorer bars also.

View Only and ***Full Access*** permissions both cause the relevant section to display. If ***View Only*** is selected, the User will be able to view records to which they have access. If Full Access is selected, the User will be able to create records, and to view and update other records to which they have access.

IMPORTANT – Understanding Record Access and "Apply to All"

View Only and Full Access permissions give access to view or add/update records ***to which each user has access***. By default, this is NOT all records in the particular section. Instead, Users have access to:

- **Records that they own** – i.e in the individual data record, their User Name is shown in the "Owner" field.
- **Records that a subordinate owns** – If John's user profile shows Susan is his ***Manager***, for example, then Susan will be able to see all data records that she or John own. If John is also Alice's manager, then John will be able to access his and Alice's records. Susan will be able to access her own, John's and Alice's.
- **Records that are explicitly Shared to them** – see below.

By selecting the 'Apply to All' radio options, you can override these default rules, giving users access to ***all*** data records in each selected section with View Only or Full Access permissions as appropriate.

System Administrators automatically have access to all records.

Level 2 – User Group

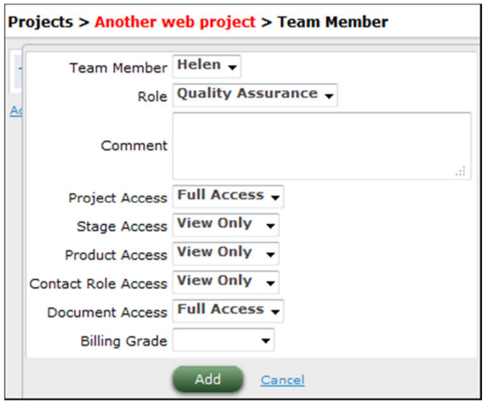
In the Setup page for each User Group, you will find another set of access rules, looking exactly like those above. Any settings you make here will ***override*** the general company-wide defaults set up at Level 1 – Company Details for all members of the Group.

Note: If a User is in multiple groups with different permission levels, BlueCamroo will apply the highest (i.e. most "open") permissions from all those Groups.

Level 3 - User

At the individual User level, there is a third set of permissions, again in the same format. Anything set here will override the permissions inherited from the Group and/or Company level. Again, there's no requirement to set anything at this level if the inherited permissions give the required results.

Level 4 – Opportunity / Project Role



The User level (Level 3) is the lowest level of Permissions control that applies system-wide. There is one more level of permissions, however, that applies to individual **Opportunities** and **Projects**. It is possible, by adding Users as Team Members to an Opportunity or a Project, to override their normal permissions, and to control in detail their access to specific sub-sections of the data.

Sharing Records between Users

As explained in the callout box on page 53 above *IMPORTANT – Understanding Record Access and "Apply to All"*, granting a user Permission to a section of BlueCamroo does not automatically grant access to all the data records in that section. Access to individual records according to the specific rights detailed above, and is modified by creating **Shares**.

Note: If you are using the "Apply to all" feature to apply Permission settings to all records in each section, you will have less need to consider Shares, however they may still be used to change the level of access on an individual record, for example to share a Lead with ***Full Access*** access to a User whose Lead permissions is normally ***View Only***.

Sharing an Individual Data Record

Any User that has Full Access access to a record can ***Share*** it to other Users and/or User Groups. Select **Settings** from the toolbar, and then **Shares**.

Mass Share – Sharing a Set of Records at One Time

Instead of sharing data records individually, it is also possible to share a set of records that meet specific criteria. On the Home page, select **Manage Data** from the toolbar then **Mass Assign Share**.

For further information about using Manage Data to work with groups of records, refer back to Section 16.

Automating Shares

BlueCamroo also allows you to set rules to automate the creation of Shares. In Setup **Shared Permissions,** pick the type of data you wish to work with (i.e. Organizations, People, etc.)

Shared Permissions work with User Groups, and allow you to define rules that embody the following logic: ***"Whenever a new record is created and the Owner is in Group A, share the record in this way with Group B".***

The following example, working with Organization Shares, shows how this may be applied to create sophisticated automated sharing rules:

System Setup > Shared Permissions > Organizations

Organization Shares

Organizations owned by members of Group	Shared with this Group	with:	Organization Access	Opportunity Access	Project Access	Case Access
Managers	Managers		Full Access	Full Access	Full Access	Full Access
Staff	Managers		Full Access	Full Access	Full Access	Full Access
Staff	Staff		View Only	View Only	View Only	View Only

Add New

With this configuration:

- Any Organization created where the Owner is a **Managers Group** member will share to the **Managers Group** with **Full Access** permission for the Organization and for related Opportunities, Projects and Cases.
- Any Organization created where the Owner is a **Staff Group** member will share to the **Managers Group** with **Full Access** permission.
- Any Organization created where the Owner is a **Staff Group** member will additionally share to the **Staff Group** with **View Only** permission.

Tip: Remember that members of the same Group do not automatically share records to one another. It is important to define the share from members of each Group to the same Group if that is the outcome you require.

BlueCamroo's Top Tips for Managing Permissions

The fact you can set different permissions for every User doesn't mean you have to! Try to set most of your permission controls at the Company or User Group level, so that every new User immediately picks up the correct permissions based on their Group memberships.

It's surprisingly easy to jump in and design complex permission rules that wind up just stopping people from doing their jobs, so ***start simple*** and develop your permissions structure in small steps as you become more familiar with the system.

Appendix 2 – Guide to Importing Data

Many of our customers tell us that the key moment for them getting started with actually using BlueCamroo day-to-day in their organization was when they got their existing customer and contact details into the system and — well — just started using it! So if you're ready to import your existing contact data, here are some tips:

1. **<u>Understand how BlueCamroo imports your data to People, Organizations, and “Contacts”</u>**

When you import data to BlueCamroo, the system will create records in People, in Organizations, and in “Contacts” (records that join up People with the Organizations where they work). Each row of your data file is processed in turn to add your data, as follows:

A row that contains:	Creates the following records:
First Name, Last Name and **unique** Company Name, e.g: ***Charlie Lewis***, CEO of ***Acme Widgets***	A Person (***Charlie Lewis***), using First Name, Last Name and any other personal data. An Organization (***Acme Widgets***), using Company Name and any other organizational data. A “Contact” record, relating Person to Organization (***Charlie*** works at ***Acme Widgets***, where he is CEO), using any available ‘role’-related data.
First Name, Last Name, and no Company Name, e.g. ***Jane Harris***	A Person (***Jane Harris***), using First Name, Last Name and any other personal data.
A **unique** Company Name, but no First Name / Last Name, e.g. ***Elegant Widgets***	An Organization (***Elegant Widgets***), using Company Name and any other organizational data

All these examples are for ***unique*** data. The system also has rules for importing ***non-unique*** data:

A row that contains:	Is processed as follows:
A **non-unique** (i.e. repeated) Company Name, and no First Name / Last Name, e.g. ***Elegant Widgets*** (again)	No data added. The system will report a rejected duplicate entry.
First Name, Last Name and **non-unique** Company Name, e.g: ***Cameron Sawyer***, Head of Procurement at ***Acme Widgets***	The duplicate Organization data is rejected. A new Person (***Cameron Sawyer***) is created, working at the already-imported Organization (***Cameron*** works at ***Acme Widgets***, where he is Head of Procurement.)
Non-unique First Name and Last Name (with or without Company Name)	The system has no way of determining whether this is a duplicate, or another person with the same name, so it creates a new Person and – if applicable – a new Contact Record.

2. **<u>Clean your data</u>**

BlueCamroo is a CRM System — not just a Contact List. That may sound like stating the obvious, but it has some important consequences if your data is currently in a simple Contact Manager like Outlook or Google Contacts. Simple tools like that aren't too fussy about what data you put in. Phone number in the Email field? Duplicate record? No problem! CRM systems — such as BlueCamroo — need more accurate data to work properly, however, so if you're importing data that began its life in a simple Contact Manager, or even just on a spreadsheet, you'll need to spend a little time checking and preparing it before you import into BlueCamroo.

So, let's say you've exported your data from wherever it is now into a "CSV" (Comma Separated Values) text file. Open it up (in Excel is easiest, if you have it installed — and you can save the file in Excel format when you're finished), and check ☑ the following:

- ☐ ***Do all the columns ("fields") have headings?*** If not, add some column headings ("field names") to identify the data.

- ☐ ***Are all the column headings plain text?*** Please remove any 'special characters', such as "&", "/", "#", etc. (Spaces are fine).

- ☐ ***Is all the data in the correct columns ("fields")?*** Check for data that doesn't "fit" the column it has been entered into. Examples might include email addresses in a phone number field; website address in an email field, etc.

- ☐ ***If you have multiple Contacts at a Company, is the Company data consistent on each Row?*** We explained above how BlueCamroo treats unique and non-unique Organization data in your import. If you have multiple People who are Contacts at a single Company ("Organization"), make sure you tidy up the data so that all the Organization data such as address, website etc. is identical on each row for that Company.

- ☐ ***Does every Person have a First Name and a Last Name?*** It's fine to have rows with no Person data (i.e. just an Organization to add), but if First Name is populated there must be a Last Name, and vice versa. Often, if you don't know one part of the name you can guess it from an email address (easy if it's "john.smith@acme.com"!), but if you're stuck just add a 'dot' so there is some data. (e.g. First Name="John"; Last Name=".")

3. Check (and add) 'coding' data

As long as your data satisfies the rules above, at least the basic information should load. For a more complete import, you'll also want to do the following:

- ☐ ***Update the 'Lookup Values' in BlueCamroo*** so that they match the data you intend to import (or, alternatively, update your data file). Lookup values to match include:

  - ☐ Industry and Sector
    Setup | Lookup Values | Industries and Sectors

  - ☐ Title (e.g. Mr, Mrs, etc.)
    Setup | Lookup Values | Titles

  - ☐ Annual Revenue (Defined ranges; not numeric input)
    Setup | Lookup Values | Annual Revenue

  - ☐ Number of Employees (Defined ranges; not numeric input)
    Setup | Lookup Values | Number of Employees

  - ☐ Source
    Setup | Lookup Values | Customer Sources

- ☐ ***Identify your Leads, Customers and Suppliers.*** Every Person and every Organization in BlueCamroo can be a Customer, a Supplier, both, or neither. You may wish to add two Columns ("fields") to your data to hold **Customer Type** and **Supplier Type**, and mark up your Customers and Suppliers so you can import this data too.

  Note that 'Lead' is a Customer Type: if a Person or an Organization is a Lead, they can't also be another type of Customer. Note also that if ALL the records you wish to import are just one type of Customer (and, optionally, one type of Supplier), you can skip this step and set the Types as you run your import.

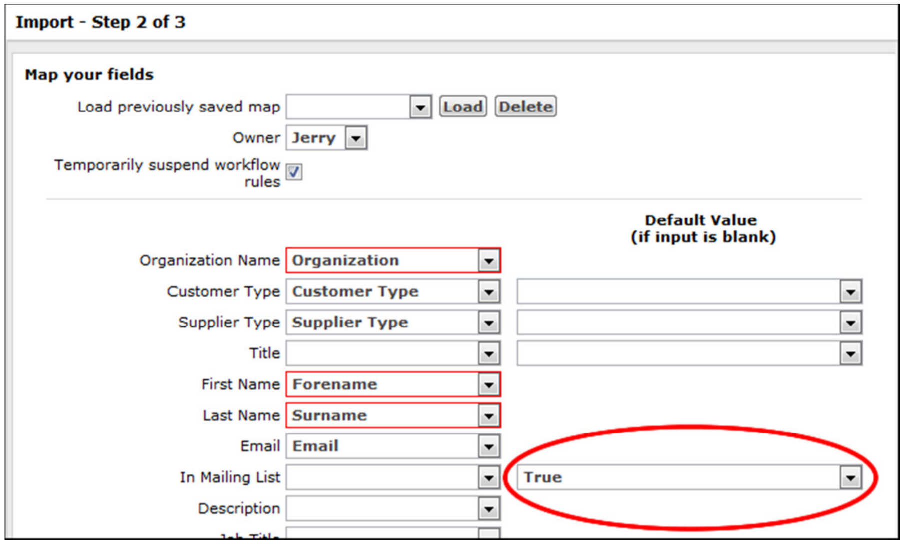
  Make sure the Customer Types and Supplier Types you input match Customer and Supplier Types set up in your BlueCamroo workspace! Check this at:
  Setup | Lookup Values | Customer Types, and
  Setup | Lookup Values | Supplier Types.

4. Go!

OK, so you've got a nice clean list. You're good to go!

Go to your Home page; click the **Manage Data** button on the Toolbar, and then the **Import** button. Now pick the file that has your data (and the individual sheet, if you're importing from a multi-sheet Excel workbook), and map the relevant fields that you want to load.

Note that BlueCamroo allows you to pick Default values for any Lookup Data not included in your input file. For example, in the screenshot below, all imported records are going to be marked In Mailing List = 'True'.



When you've mapped all the fields, start the import!

Oh! You've got rejected records…

This is pretty normal when you have data about more than one contact at some of the companies you do business with. BlueCamroo will load the company ("Organization") data the first time it comes across it, then reject all the next rows for the same company that it comes across. That's perfectly correct, and nothing to worry about.

5. If you decide to try again…

Suppose you've done your first import, and you can see a few things you'd like to have done differently. So you delete your data from BlueCamroo, update your file, and try again...

...and BlueCamroo rejects everything!

Don't panic! BlueCamroo is very strict about preventing duplicate data. What has happened is the data you loaded before is still in the system, sitting in the Recycle Bin. Because you might 'undelete' this data in the future, BlueCamroo won't let you load new data that duplicates it. Just go to the Recycle Bin (bottom-right in your screen), permanently delete the old records, and try your import again.

What to Do if Bad Things Happen

If you've followed the steps above and you're still struggling to load your data, please don't give up. Transforming and loading data is one of the most tricky parts of migrating to any new CRM system. Just email a copy of your data file to support@bluecamroo.com and one of our technicians will be glad to check your data and identify any remaining issues that are stopping it from loading.

We're here to help!

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