

BlueCamroo

User Guide v. 4.0



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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 20th Century (perhaps even 19th Century!) workplace, where employees work for one company at a time and are simply boxes on an organization chart, BlueCamroo is built for the 21st 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.

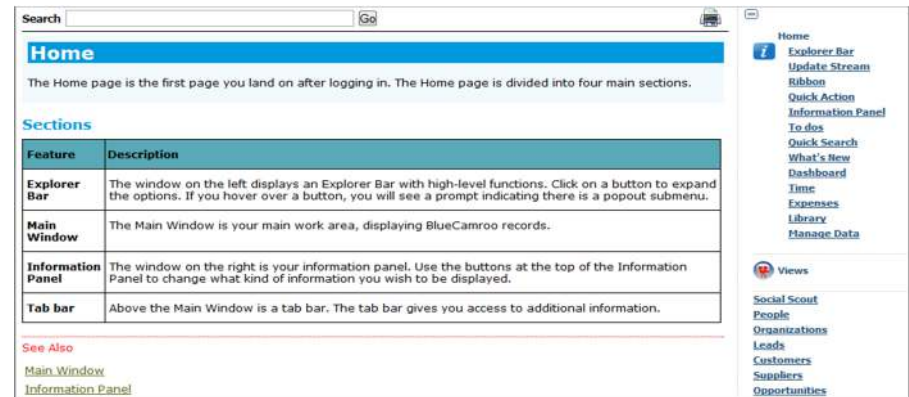
This User Guide is NOT intended to be a screen-by-screen System Manual for every BlueCamroo feature. Instead, our main goal here is to give you an end-to-end understanding of how BlueCamroo "fits together" and can be used to benefit each area of your business: literally, to **guide** you through the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

