

# BlueCamroo

## User Guide v. 4.0



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## 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](http://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.

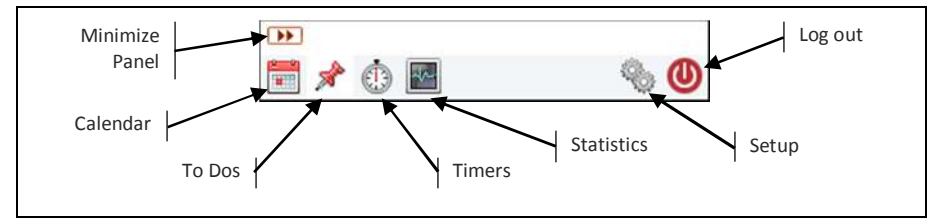
The Quick Action ⚡ button is your main tool for adding data to the system, and for actions such as sending email and logging calls.

#### 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.



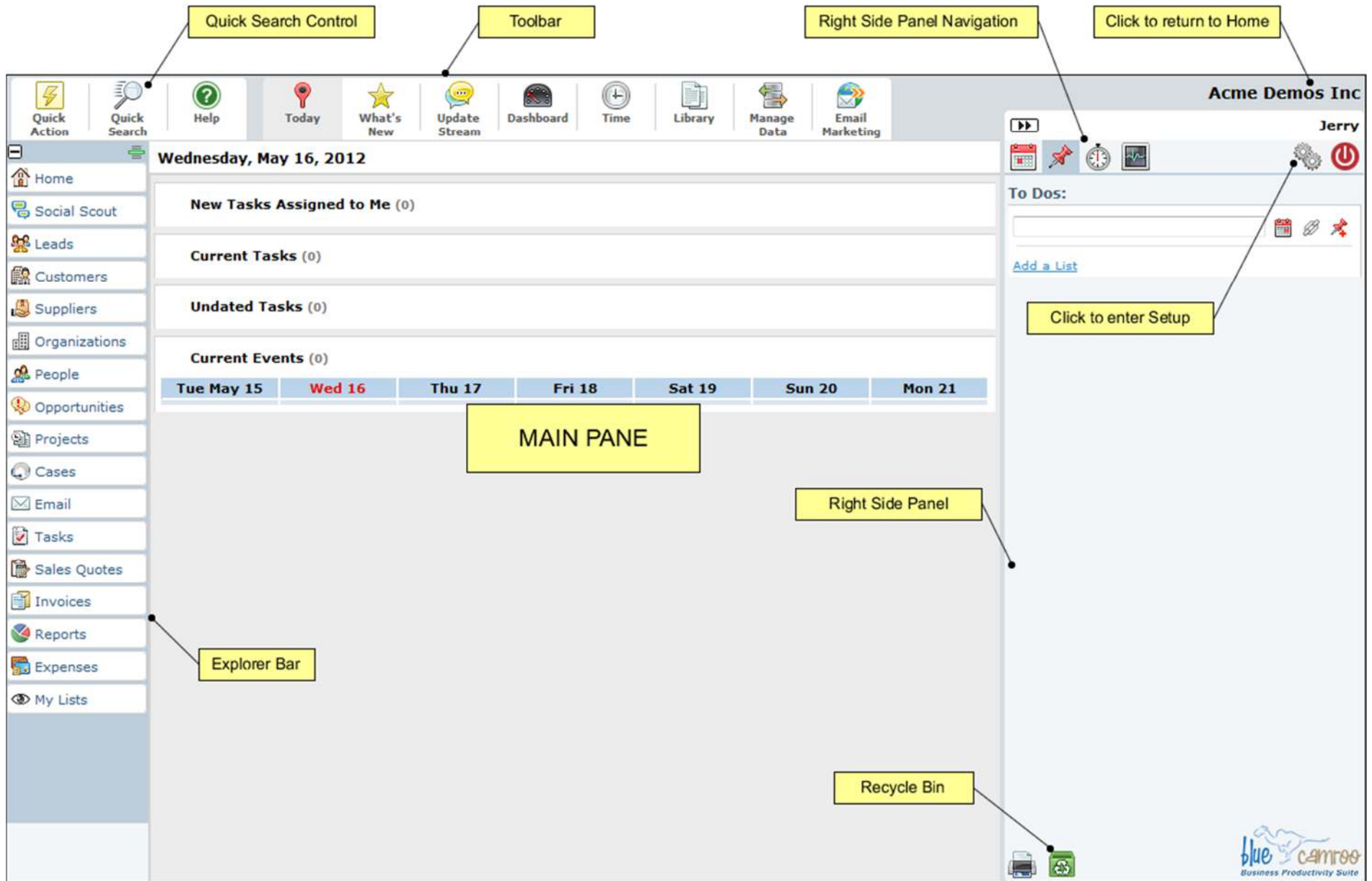
### 2.4 Add Colleagues

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

