

BlueCamroo

User Guide v. 4.0



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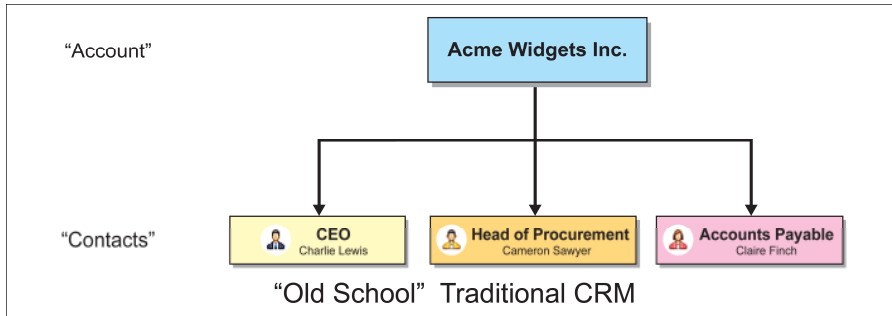
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3. How BlueCamroo Organizes Data

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

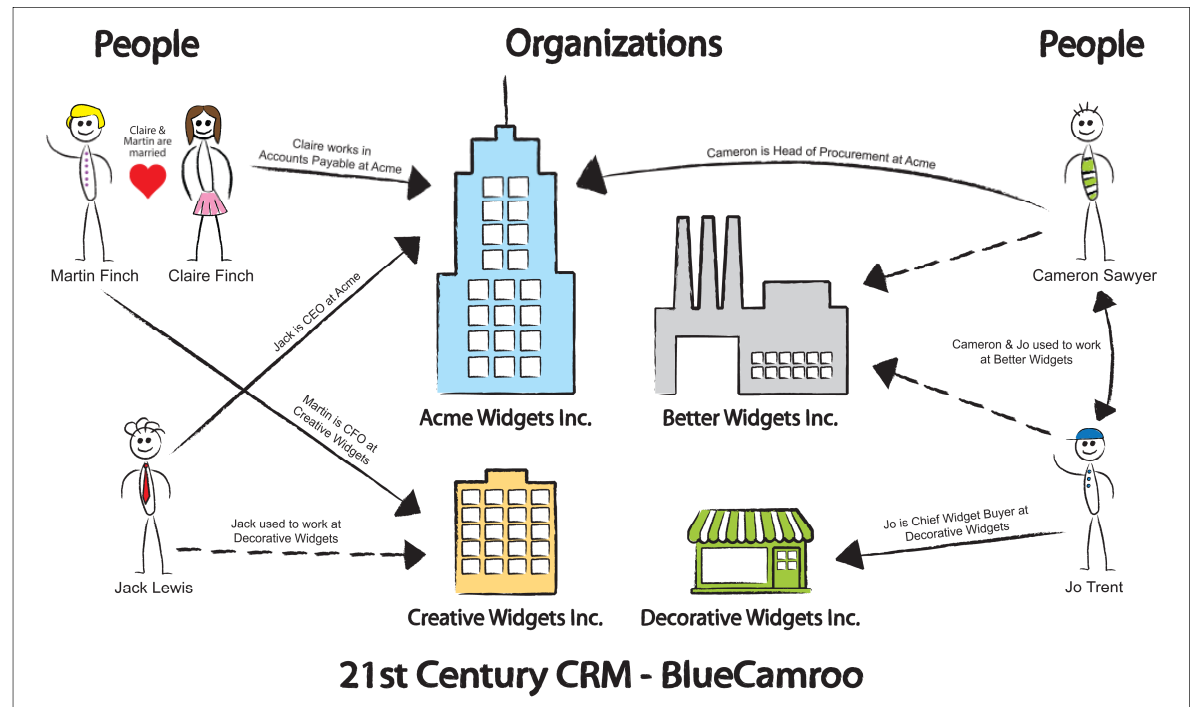
college alumni body, for example, where you're just interested in grouping together all the People that are members of that one body.

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.

