



Adding/ Administering Users in BluWave crm

Add new users to **BluWave crm** as follows:

1. Click on the **System Setup Tab**
2. Click on the **Administer Users** Tab underneath

You will only be allowed to add as many “Active Users” as the number of licenses you have purchased.

The screenshot shows the BluWave CRM interface with the 'System Setup' tab selected. Underneath, the 'Administer Users' sub-tab is active. The 'Security Roles' section displays a table of existing users with columns for Full Name, Branch, User Manager, Executive, System Admin, and Setup. A 'New User' button is located at the top right of the table, with an arrow pointing to it from the text below.

	Full Name	Branch	User Manager	Executive	System Admin	Setup
Edit	Alex	Cape Town Branch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	byron	Cape Town Branch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Denzil Govender	Cape Town Branch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Quin Bergh	Johannesburg Branch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Samuel Kimathi	Cape Town Branch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Sheila Welch	Johannesburg Branch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Tania Cooke-Tonnesen	Johannesburg Branch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Click on “New User” and this will allow you to enter the new user’s details to create their account on BluWave CRM as shown below.

The screenshot shows the 'New User Details and Roles' form. It contains the following fields and options:

- Full Name: John smith
- Monthly Target: 0
- Branch: Johannesburg Branch
- Date Captured: 13/01/2012
- Designation: Sales Manager
- Telephone: 011 781 0491
- Cell: 082 414 9138
- Email: john@abc.co.za (Note: The Email address will be used as the User Name.)
- Roles: User, Manager, Executive, System Admin, Setup
- Buttons: Save User Details, Save & New, Cancel

Assign the required security level to the user by ticking on the appropriate check box. The different access levels are explained at the end of this document.

Click on “Save User Details” to create the account or “Save & New” should you wish to create an additional account. The user will then receive an email with their login credentials.

Edit My Profile/Change Password

This page allows the user to access their personal details and also allows them to change their passwords. The page is accessed from either the “**Edit My Profile**” menu on the home page or from the “**Change Password**” link on the top right of the page.

Should a user leave the company you can deactivate their account by deselecting the “Active” tick box – you will then have another license available to create your new user.

The screenshot displays the 'Edit User Details and Roles' page in the BluWave CRM. The user profile for John Smith is shown, including fields for Full Name, User Name, Branch, Designation, Telephone, Cell, Email, Monthly Targets, No of Quotes, No of Units, GP Value, and Email SMTP Settings. The 'Active' checkbox is checked, and a callout box points to it with the text 'Uncheck this tick box and update details for users who have left the company'. The page also features a search bar, a quick create button, and a calendar widget.

On this page, the user can also specify whether they want the system to post appointments to their Email calendar. Specify whether you are using a local calendar e.g. Outlook or a web based calendar e.g. Gmail by selecting the appropriate radio button.

Enter your Email SMTP settings, Username and Password on this page to allow sending Emails from the BluWave CRM.

Only a System Administrator can change the following:

- Roles – Indicates the access levels of users
- Branch- Indicates the branch the sales person is in within the company
- Active- The Administrator can use this check box to deactivate log ins for users who have left the company.
- Monthly Target-Indicates the monthly revenue target set for the sales representative

Security in *BluWave crm*

There are 4 levels of Security in the *BluWave crm* system. They are:

- Users
- Manager
- Executive
- System Admin
- Setup

Users Level Security

The login with User level security can only access clients that have been allocated to their name (sales staff on client details). In addition, Users cannot edit activities belonging to other users and cannot modify the Drop Down lists. Sales staff on Client Details screen cannot be changed.

Managers Level Security

The login that has been assigned as member of Users, Managers can access their own clients, as well as clients allocated to sales people in the same branch that they have been allocated to. There is full “Add” and “Edit” capability on these clients, but no “Delete” capability. In addition, he may access the activity schedule of all reps in the same branch through the “Diary Planner” and “To do” list. In addition he can edit activities belonging to other users. Drop down lists cannot be modified.

Executive Level Security

The login with Executive level security can access all clients. In addition he also cannot edit activities belonging to other users. Drop down lists cannot be modified. Sales staff on Client Details screen cannot be changed.

System Admin Level Security

The login that has been assigned as member of Users, Managers and System Setup can access all clients in the database. There is full add, edit and delete capability on these clients. Drop down lists cannot be modified. Sales staff on client details can be changed. This level allows the specific user to Add/ Change all user login details.

Setup Level Security

A login that has been assigned to the Setup group can access all clients in the database. He can also edit activities belonging to other users as well as allocate clients to other sales reps. This security level also grants the user full “Add” and “Delete” capability. The Setup security level allows the login to edit and modify the drop down lists.