



BluWave CRM- Training Manual



For support please contact: 011 462 6871 or support@bluwave.co.za.

Other Manuals Available:

General:

- BluWave- Managing Users
- BluWave- HTML Signature
- BluWave- Email Settings
- BluWave- Document Management
- BluWave- Importing Data
- BluWave- Merging Companies
- BluWave- List Manager
- BluWave- Geo Location & Travel Claim
- BluWave CRM- Product Attachment
- BluWave- Sage One Integration

CRM:

- BluWave CRM- Setup Manual
- BluWave CRM- Training Manual
- BluWave CRM- Leads Management
- BluWave CRM- Quote Cover Letters
- BluWave CRM- Quote Approval
- BluWave CRM- Managing Foreign Currencies
- BluWave- Current Products
- BluWave CRM- Report Summary
- BluWave CRM- Workflows

Service:

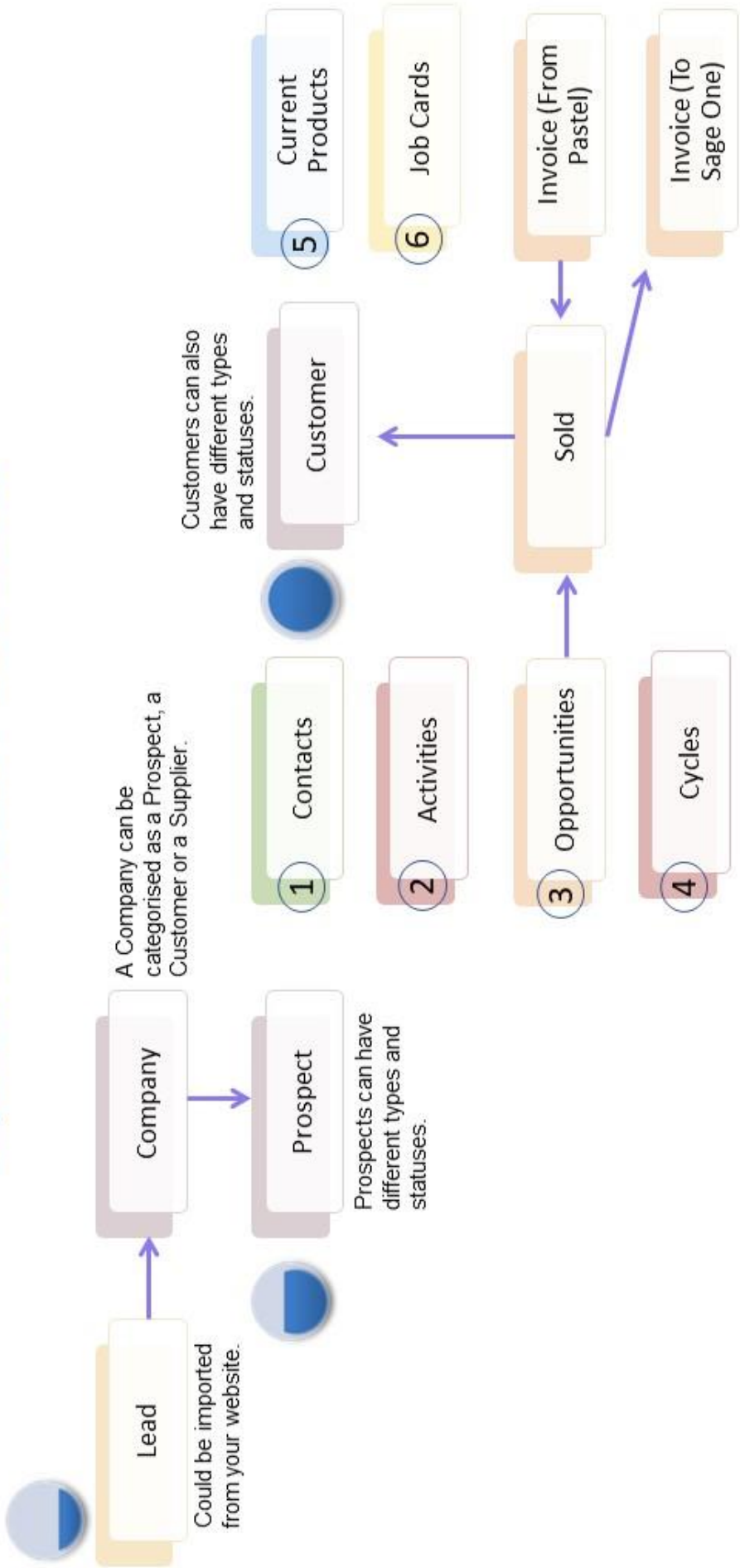
- BluWave Service- Setup Manual
- BluWave Service- Training Manual
- BluWave Service- Keywords
- BluWave Service- Escalations
- BluWave Service- Report Summary

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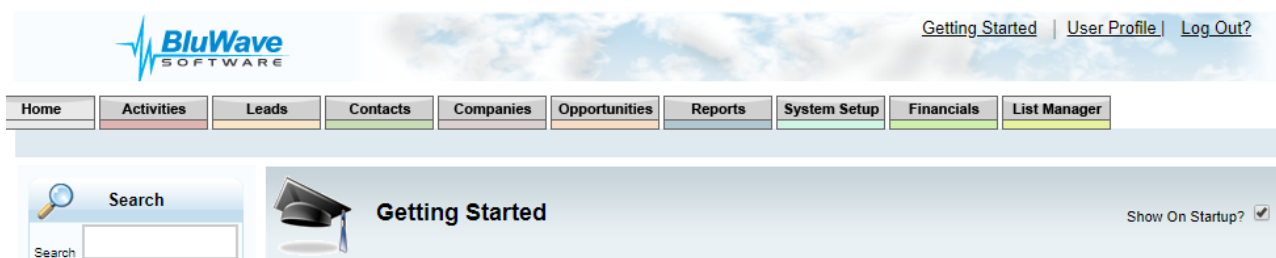
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System Process Overview



1. System Overview




Home	The Home Tab gives the user access to Appointments, Tasks, Recent Opportunities, New Leads, Recent Companies and the Sales Pipeline. The Calendar allows the user to navigate to any date and the Quick Create menu is a shortcut to relevant pages in the website. The user's dashboard with a graphical summary of his key statistics is also accessed from the Home tab.
Activities	The Activities Tab allows the user access to all the pages used to manage all your daily appointments and to-do's.
Leads	The Leads page is used for loading and editing Leads that have not yet been qualified. Once contact is made with the leads, they are converted to the Companies tab – see below.
Contacts	The Contacts page allows the user to search on all contacts entered. New contacts can also be added from this page. This page will only show the contacts entered for Companies only and not for Leads
Companies	The Companies page is used to display and edit all relationship information about the client. From this page you can view and edit a client's contact people, history of activities, scheduled activities and sales opportunities.
Opportunities	The Opportunities page allows you to see all your active and inactive deals. You can edit your opportunities on this page, update the sales status, filter and sort any field in ascending or descending order.
Reports	The Reports page will allow you to access all the reports available in system. Examples of reports included are Activity reports, Opportunity reports, Company reports and Lead Reports.
System Setup	The system setup page is used to edit and configure drop down lists to suit their requirements.

2. Home Tab

There are 3 sub tabs accessible from the Home tab: **Home**, **Dashboard** and **Edit my Profile**.


2.1 Home Page

The Home Page allows you to view appointments, tasks, and opportunities. You can also view recently added companies and a graphic display of your pipeline.



[Getting Started](#) | [User Profile](#) | [Log Out?](#)


[Home](#) | [Activities](#) | [Leads](#) | [Contacts](#) | [Companies](#) | [Opportunities](#) | [Reports](#) | [System Setup](#) | [Financials](#) | [List Manager](#)

[Home](#) | [Dashboard](#) | [Edit My Profile](#)


Search

 Search
 Within Please Select...


Quick Create
 Please Select...


Calendar


<


January 2020


>

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Last Invoice Date:



Appointments for Today
 No Data to Display
[Go to Diary Planner](#) [To do list](#)


Tasks for Today
 No Data to Display
[Go to Diary Planner](#) [To do list](#)


Recent Opportunities


BluWave Software	Extrusion
BluWave Software	HP MFP m277dw
BluWave Software	HP Ink Pink - 650
BluWave Software	Quoted Products
Thoba's Training	Quoted Products


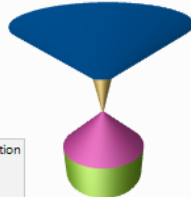
[Go to Opportunities](#)



New Leads

Training Michelle	Michelle Snyders	Qualified
Training Michelle	Michelle Snyders	Converted
Tiger Brands	Tamara Kenny	Active Lead
Ministry of Magic	Harry Potter	Active Lead
Ezra Music Lable	Goerge Ezra	Active Lead

[Go to Leads](#)




Recent Companies
[Training Michelle](#)
[Training Pieter](#)
[Vodacom](#)
[Test Stuart](#)
[Grass Gardens](#)
[SABS](#)
[Testing Workflows](#)
[Lollipop Company](#)
[Go to Companies](#)


Pipeline for January



Quote Approvals Required

Spur Steak Ranches	1107	Michelle Snyders	<input type="checkbox"/>
Spur Steak Ranches	1106	Michelle Snyders	<input type="checkbox"/>
Michelle Home	1104	Michelle Snyders	<input type="checkbox"/>
Michelle Home	1103	Michelle Snyders	<input type="checkbox"/>

[Go to Quote Approvals](#)


GP Pipeline for January


2.1.1 Search, Quick Create & Calendar

The screenshot displays two main sections of the BluWave CRM interface. The top section, titled 'Search', features a magnifying glass icon, a text input field labeled 'Search', and a dropdown menu labeled 'Within' with the text 'Please Select...'. The bottom section, titled 'Quick Create', has a green plus icon and a dropdown menu labeled 'Please Select...'. This dropdown is open, showing a list of options: Appointment, Task, Company, Contact, Lead, Opportunity, Quote, Send Email, and Cycle. Below the dropdown is a calendar grid showing dates from 19 to 9. At the bottom of the Quick Create section, there is a red text label 'Last Invoice Date:'.

The **Search Field** allows you to search throughout the system, by clicking on the dropdown, and selecting where you would like to search.

The system also allows for a wildcard (%) in the search fields.

The **Quick Create menu** on the left of the Home Screen acts as a short cut to navigate to relevant screens within the system to create (for example) a new appointment, task company, lead, or opportunity.

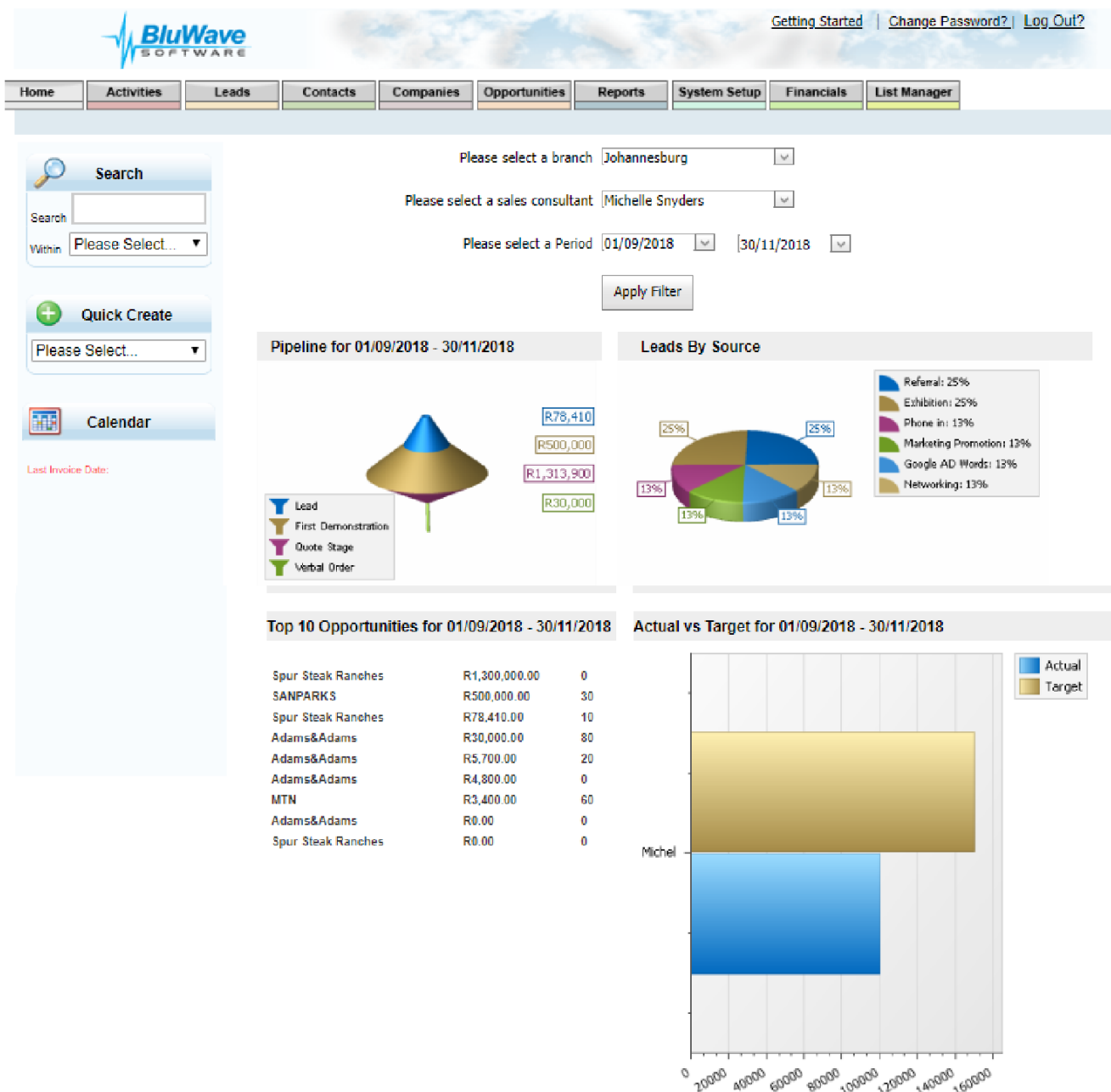
The **Calendar** allows you to easily switch the Home Page & your Diary Planner to another date and shows the relevant activity information for that specific date.

2.3 Dashboard

The Dashboard provides an overview of your sales data for the selected date range, including an **Actuals Pipeline** and a **GP Pipeline**, as well as two bar graphs showing your **Actuals vs. Target** and your **Actual vs. Target GP** (both measuring a ZAR value).

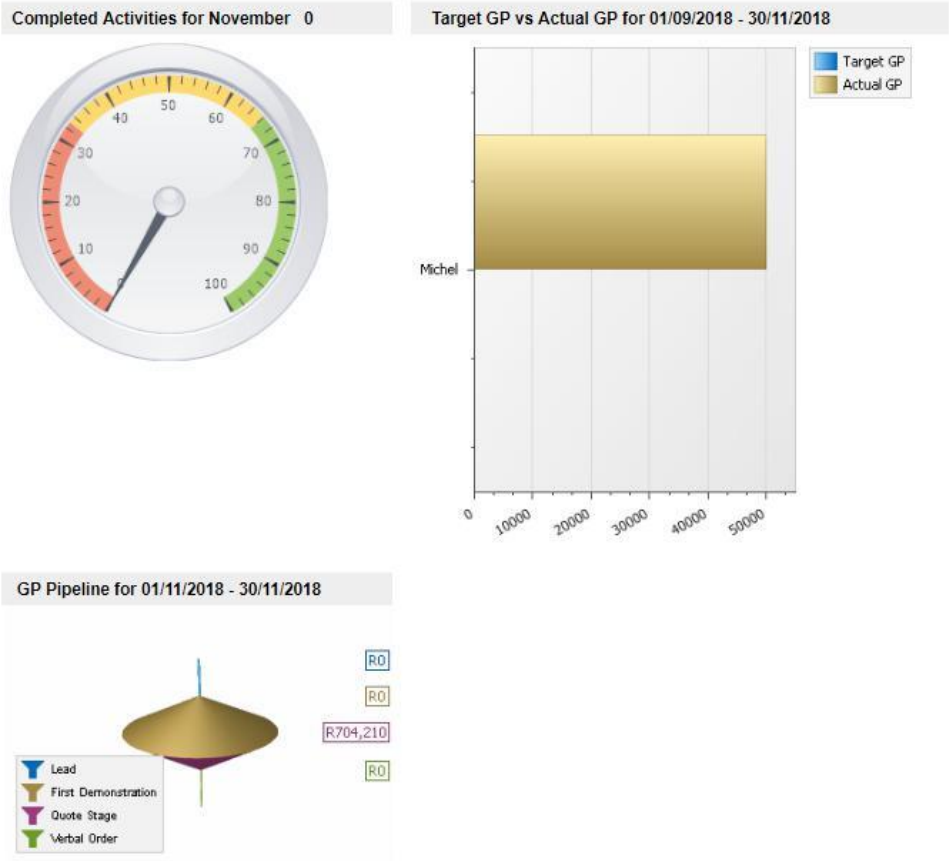
It also breaks down through which marketing channels you received your **Leads**, in a percentage format.

Your Top 10 Opportunities will also be listed on this page, according to their monetary value.



(Continued on the next page)

On this page you will also find a gauge indicating the number of **Completed Activities** for the current month, and the percentage of how many are completed.



2.4 Edit User Profile

This page allows the user to access their personal details and allows them to change their passwords and add their HTML signature for emails. This page is accessed from either the **Edit My Profile** sub tab on the home tab or from the **User Profile** link on the top right of the page.

On this page, the user can specify if they want to activate Google Mapping on face-to-face activities; the user also has the option to default the company on new activities to their closest client; and 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 the relevant Email Settings, Username and Password on this page to allow sending Emails from the BluWave CRM. (Note: Remember to update regularly in order to ensure that BluWave will be able to send emails and post appointments to your calendar)

Only a **System Administrator** can change the following:

- **Roles**- Indicates the access levels of users.
- **Branch**- Indicates the branch the salesperson 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.

[Getting Started](#) | [User Profile](#) | [Log Out?](#)

Home | Activities | Leads | Contacts | Companies | Opportunities | Reports | System Setup | Financials | List Manager

CRM Setup | Administer Users | Edit Profile | Imports | Quote Setup | Pricelist Management | Documents | Volume Pricing | Workflow

Search

Search Within Please Select...

Quick Create

Calendar

January 2020						
Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Last Invoice Date:

Edit User Details and Roles

Full Name

Branch Johannesburg

Sub-Branch/Division:

Designation

Telephone

Cell

Email

Active ☒

User Name

Date Captured

Rep Code

To Change your Password, first click on the Change Password button.

Monthly Targets	
No of Quotes	<input type="text" value="0"/>
Target Quoted Value	<input type="text" value="0"/>
Target Sales Value	<input type="text" value="50000"/>
GP Value	<input type="text" value="10000"/>
No of Units	<input type="text" value="0"/>
No of Face-to-Face Visits	<input type="text" value="0"/>

Approval Manager

Do you want to copy your active opportunities to the current month? ☒

Do all Quotes from this user Require Approval? ☒

Track Geo Location of Activities? ☒

Default New Activity Company to the nearest Company based on Geo location? ☒

Do you want BluWaveCRM to book appointments into your email calendar? ☒

Please choose which email client/calendar you are using?
 ☐ POP3
☒ (ICal)
☐ Gmail
☐ Exchange/Outlook 365

Email SMTP Settings : (The SMTP settings are used when sending emails from BluWave CRM)

SMTP SMTP User Name

Secure Connection (SSL) ☒ SMTP Password

SMTP Port

Roles

<input checked="" type="checkbox"/> User	<input checked="" type="checkbox"/> Manager	<input checked="" type="checkbox"/> Executive	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Setup	<input checked="" type="checkbox"/> List	<input type="checkbox"/> GP	<input checked="" type="checkbox"/> Approval	<input type="checkbox"/> Claim Leads
<input type="checkbox"/> Product Manager	<input type="checkbox"/> Restricted User	<input type="checkbox"/> Restricted Manager	<input type="checkbox"/> Restrict Pricelist	<input type="checkbox"/> Create Non-Stock Items				

2.4.1 Set Location for Travel Claim Report

User must set their default location (work/home address) on their profile- this will calculate from where the users are leaving to go to appointments most often, for travel claim purposes. Click on the **Use Current Location** button or the **Select From Map** button in the users' profile.

BluWave SOFTWARE [Getting Started](#) | [User Profile](#) | [Log Out?](#)

Home | Activities | Leads | Contacts | Companies | Opportunities | Reports | **System Setup** | Financials | List Manager

CRM Setup | Administer Users | Edit Profile | Imports | Quote Setup | Pricelist Management | Documents | Volume Pricing | Workflow

Edit User Details and Roles

Full Name: Michelle Snyders | User Name: michelle@demo.co.za | Date Captured: 03/09/2018 00:00:00 | Rep Code: AC16

Branch: Johannesburg | Sub-Branch/Division: | Designation: Implementation Consultant | Telephone: 011 462 6871 | Cell: 074 586 3506 | Email: mibpsnyders@gmail.com

Active: ☒ | Change Password | HTML Signature

To Change your Password, first click on the Change Password button.

Monthly Targets

No of Quotes	0
Target Quoted Value	0
Target Sales Value	50000
GP Value	10000
No of Units	0
No of Face-to-Face Visits	0
Approval Manager	

Do you want to copy your active opportunities to the current month? ☒

Start and End GIS Location

Rate Per Km: 2.5 | Rate Per Hour: 0

To check what or if a location has been set- click on the **Select From Map** button in the users' profile to view the map. The selected location will be indicated by a red pin.

BluWave SOFTWARE [Getting Started](#) | [User Profile](#) | [Log Out?](#)

Home | Activities | Leads | Contacts | Companies | Opportunities | Reports | **System Setup** | Financials | List Manager

Michelle Snyders
Select location from map below
Latitude: -25.860767364502 | Longitude: 28.1478404998779 |

Map | Satellite

Map showing Pretoria, South Africa. A red pin is located near Wierdapark.

3. Companies

3.1 View Companies

When clicking on the **Companies tab**, the **View Companies page** will show by default.

Use the **View Companies Screen** to:

- Search for the company name to view the details of the client.
- Add new Clients to the database.

This page allows you to see all loaded companies (depending on what roles [user rights] you have).

Search for particular companies by using the filters on the far right; typing in the search field; or using the letters listed beneath the search field.

This page allows you to see all loaded companies.

You can also sort each of the columns by clicking on the underlined heading.

View Companies

Search Go! Filter: All Companies

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

<u>Company Name</u>	<u>Acc No</u>	<u>Cat</u>	<u>Type</u>	<u>Industry</u>	<u>Area</u>	<u>Sales Rep</u>	<u>Created</u>
Edit Delete Adams&Adams		P	On The Fence	Financial Services	JHB Midrand	Michelle Snyders	12/09/2018
Edit Delete ADT/Fidelity		P	Definite Interest	Security		Michelle Snyders	12/09/2018
Edit Delete Afrox		P	On The Fence	Retail	JHB Midrand	Michelle Snyders	12/09/2018
Edit Delete Big 5 Guards	1024	C	Commercial	Security	JHB Eastern Suburbs	Byron Cooke-Tonnesen	26/05/2017
Edit Delete BluWave Software	2346	C	Residential	Software	JHB Northern Suburbs	Byron Cooke-Tonnesen	26/05/2017
Edit Delete Brittan Health Care (Zwelethu Capital)		P	Enquiring Only			Michelle Snyders	27/11/2018
Edit Delete Chet		C				Michelle Snyders	26/07/2017
Edit Delete Chet Chemicals		P	Definite Interest	Chemicals		Byron Cooke-Tonnesen	04/08/2017
Edit Delete Explore.net		P	Enquiring Only	Tourism	JHB Midrand	Byron Cooke-Tonnesen	26/05/2017
Edit Delete Grass Gardens		P				Michelle Snyders	17/05/2019

1 2 3 4 5

To **access/edit** the company, click on either the **Company Name** or on the **Edit link** on the left-hand side of the company.

3.2 Adding a Company



A new company (prospect or customer) can be added to your system, by clicking on the **Add Company** sub tab.

Alternatively, a company can be added by using the **Quick Create** dropdown on the left side of the screen.

On this page you will be required to fill in the following information:

- **Company Name**
- **Category** – Prospect; Customer; or Supplier
- **Type & State** – both of which are dependent on the category chosen
- **Industry** – of the client
- **Area** – geographical location of the client
- **Payment Terms, Currency to Quote, Quote incl. VAT, Price Factor, Pricelist** (for quoting purposes)
- **Account Number** - only if they are a Customer with a debtor's number
- **Group** – Refers to a Holding Company
- **Website** – of the client
- **User-defined fields** – 2 numeric fields, 1 date, 3 dropdowns, 2 alpha-numeric fields. (These would only need to be populated if your system has been setup to utilize these fields)

Click on the **Save** or **Save & New** button when done.

3.3 Edit the Company Details

Once you have saved the company you will be directed to the **Edit Company** page.

The screenshot displays the 'Edit Company' interface in the BluWave CRM. The top navigation bar includes links for 'Getting Started', 'User Profile', and 'Log Out?'. Below this is a secondary navigation bar with tabs for 'Home', 'Activities', 'Leads', 'Contacts', 'Companies', 'Opportunities', 'Reports', 'System Setup', 'Financials', and 'List Manager'. The 'Companies' tab is active, showing sub-links like 'Add Company', 'View Companies', 'Contract Pricing', etc. The main content area is titled 'Edit Company' and features a 'Company Detail' section. This section contains various input fields for company information, including 'Company Name' (Training Michelle), 'Sales Staff' (Michelle Snyders), 'Category' (Prospect), 'Type' (Definite Interest), 'State' (Enquiry), 'Source' (Exhibition), 'Industry' (Info Technology), 'Area' (PTA Centurion), 'Payment Terms' (30 Days), 'Currency to Quote' (Rand), 'Price Factor' (1), 'Account Number', 'Group', 'Website' (www.bluwave.co.za), 'Staff' (200), 'Number of Printers' (5), 'Financial Year End' (29/02/2020), 'Printer Type' (Chain), 'Main Application Use' (Marketing Materials), and 'Current Supplier' (Epson). To the right of these fields is a map showing the location of the company. Below the 'Company Detail' section is a list of related items, each with a 'New' or 'Edit' button: 'Contacts' (New), 'Cycles' (New), 'Scheduled Activities' (New), 'Completed Activities' (New), 'Opportunities' (New Quote), 'Current Products' (New), 'Product Usage' (Edit Usage), 'Jobs' (Open), and 'Workflow'.

At any point in time if the user wishes to update the details of the company, they can make the changes, and click on the **Update** button to save these changes.

By using the panels below the company details on this page, the user will be able to add and view all:

- Contacts
- Cycles
- Activities
- Opportunities
- Current Products
- Jobs
- Workflows related to the company

Note: The map on the right-hand side will only appear after a contact has been added to the company (with a physical address) and Google Maps registers the address.

Alternatively, if you are already at the Companies' premises, you could click on the **Use Current Location** button at the top of the page to save your current GPS co-ordinates. You could also use the **Select Location From Map** button to add an address to the Company page. This will not add or update the physical address on any of the **Contacts**.

3.4 Add/ Edit Contacts

Contacts can be added from the **Company Page**, **Quick Create** dropdown, or **Add New Contact** link under the **Contacts** tab.

From the Edit Company page:

- Expand the Contact list by clicking on the down arrow on the green **Contacts** panel
- Click on the **New** link to add a new contact.
- Click on the **Contact Name** in order to open the **Edit Contact** page.

Contacts without an email address won't be available for meeting invites or email filing

Notes made here will not appear on any reports.

The screenshot displays the 'Edit Contacts' interface in the BluWave CRM. The top navigation bar includes links like 'Getting Started', 'User Profile', and 'Log Out?'. Below this is a menu with tabs: Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, Financials, and List Manager. The 'Contacts' tab is active, showing 'Add New Contact' and 'View Contacts' links. The main form is titled 'Edit Contacts' and contains several sections: 'Contact Details' (Company, Title, Surname, Designation, Category, Secretary, Birthday, Email), 'Address Details' (Postal Address, Physical Address, Town/Code, Country), and 'GIS Details' (Building/Office Park, Street No & Name, Suburb, Province/Code, Country). A 'Note' field is present with a callout box stating: 'Notes here will not be visible to clients or on reports.' The bottom of the form shows 'Last Updated' and 'Updated By' information.

At the bottom of the page you would be able to see when the contacts' details were last updated and by whom.

- Make your changes to the contact and click on the **Update** button.

If you have more than one contact listed under the company and they have different addresses, you are able to choose which contact's address should appear as the main address on the **Edit Company** page (map).

Simply click on the **contact's name** and on the Edit Contact page click on the **Update Company Location from Address** button. The map on the Edit Company page would then be changed to this address.

4. Activity Management

An **Appointment** (Date and Time) and a **Task** (Date only) are both classified as an **Activity**.

How to add a New Activity:

- On the **Edit Company** page- click on the **New** link, on either the **Scheduled Activities** or **Completed Activities** panel.
- On the **Activities** tab, click on the **Add New Activity** sub tab, or directly on the **Diary Planner**.
- **Quick Create** (Appointment or Task).

When adding an activity via the **Quick Create/ Activities** tab, and if you enabled the **Default New Activity Company to the nearest company based on Geo Location** checkbox in your profile, the system will pre-populate your nearest client's details.

The screenshot shows the 'Add Activity' form in the BluWave CRM. The form is divided into several sections. On the left, there is a 'Search' bar and a 'Quick Create' dropdown. Below that is a 'Calendar' for February 2020. The main form area is titled 'Add Activity' and includes a 'Save' button. The 'Appointment Details' section contains the following fields: 'Sales Staff' (Michelle Snyders), 'Company' (with a magnifying glass icon and a red box saying 'Please Wait. Checking for nearest Company ...'), 'Contact', 'Location', 'Activity', 'Task?' (checkbox), 'Start Date' (10/02/2020), 'End Date' (10/02/2020), 'Quote/Opp No.' (Document), 'Quote Status', and 'Note'. There are also 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

This helps you as the user to quickly create a call report for the company you are physically at. This is especially useful for the salesperson who calls on customers without an upfront appointment.

If this is not the correct company, you will be able to use the magnifying glass and do a Company Lookup.

4.1 Add an Activity (Task/ Appointment)

Any of the before-mentioned ways to add an activity will direct you to this page.

The screenshot shows the 'Add Activity' form in the BluWave CRM interface. The form is titled 'Add Activity' and includes a search bar, a calendar, and various input fields for appointment details. Callouts provide additional information:

- Search:** A magnifying glass icon is used to search for the relevant company.
- Company:** A new contact can be added to the selected company, by clicking on this icon (the magnifying glass icon next to the company name).
- Task?:** A checkbox next to 'Task?' will change the activity from an appointment to a task, which will disable the time fields. The tasks that you create on the system will not be pushed through to your calendar, it will only show on your diary planner under the **Activities** tab.
- Note:** The client will see these notes, if you check the invite checkbox (appointment).

The form includes the following fields and options:

- Appointment Details:**
 - Sales Staff: Michelle Snyders
 - Company: Green Leaf
 - Contact: Bobby Roots - Sales Rep - Influencer
 - Location: 4 Davenport Street Lynnwood Manor
 - Activity: Presentation
 - Task?: ☐
 - Start Date: 10/02/2020, 08:00
 - End Date: 10/02/2020, 08:30
 - Quote/Opp No: [Dropdown]
 - Quote Status: [Dropdown]
 - Note: Meeting to do a presentation to the client regarding the new product range we offer.
- Buttons:** Save, Save & New, Cancel
- Calendar:** February 2020
- Quick Create:** Please Select...
- Search:** Search, Within: Please Select...
- Footer:** Complete Activity? ☐ Current Location: -25.8767304, 28.15654

- The **View Map** link will direct you to Google Maps; you can then use this to get directions to the location of the appointment.
- The **Location** of the activity can be changed by typing in the required location.
- Select the type of Activity.
- Ticking the checkbox next to **Task?** will change the activity from an appointment to a task, which will disable the time fields. The tasks that you create on the system will not be pushed through to your calendar, it will only show on your diary planner under the **Activities** tab.
- Type a **Note** for the activity if required.
- Click on the **Save** button. If you wish to create another activity click on the **Save & New** button.

4.1.1 Inviting the selected Contact to an Appointment

Next to the **Contact** field is a checkbox; if this box is ticked it will automatically send the individual in the contact field a meeting request.

If you do not wish to send an appointment invitation to your customer, then uncheck this box.

4.1.2 Inviting multiple contacts to an appointment

BluWave CRM allows you to invite multiple contacts to the same appointment if required.

Step 1: Click on the **Additional Invitees** button on the appointment screen (next to the invite contact checkbox).

Step 2: Select the recipients by clicking on the **green cross** next to each name you would like to invite. The required invitees will appear on the right-hand side with a red dash. If you decide one of the already selected invitees does not need to receive an invite, you can simply click on the **red dash** and the invitee will be removed.

The screenshot shows the 'Add Appointment Invitees' screen in the BluWave CRM. On the left, there is a search bar with 'Green Leaf' entered and a 'Quick Create' button. Below the search bar is a calendar for February 2020. The main area has two radio buttons: 'Client Contacts' (selected) and 'Internal Staff'. Below these is a search bar with 'Green Leaf' and a list of contacts to add: Bobby Roots - Sales Rep and Patty Morris - Sales Manager. To the right of this list is a 'Required Invitees' section with a red dash next to Patty Morris - Sales Manager. A green cross is highlighted next to Bobby Roots - Sales Rep. Buttons for 'Done' and 'Cancel' are at the top right.

Step 3: To include internal recipients to the appointment, select the **Internal Staff** radio button and this will show a list of all the Users of your BluWave CRM system. Add the required invitees by clicking on the **Green Cross** next to their names and they will display underneath the required invitees.

The screenshot shows the 'Add Appointment Invitees' screen with the 'Internal Staff' radio button selected. The search bar still contains 'Green Leaf'. The list of contacts to add now includes Charmaine, Hansie Keller, Michelle Snyders, and Simphiwe Nkosi, each with a green cross next to their name. The 'Required Invitees' section now includes Patty Morris - Sales Manager and Hansie Keller. Buttons for 'Done' and 'Cancel' are at the top right.

Step 4: If you wish to invite contacts from multiple companies to the same appointment, you can use the magnifying glass to search for the additional companies. Repeat Step 2 to add them to the required invitees.

Step 5: Click on the **Done** button once finished. You will then be directed back to the **Add/Edit Appointments** page.

The multiple invitees will appear on the right-hand side of the appointment page.

When saving the appointment, an appointment invite will be sent to the main contact as well as the multiple invitees.

On your diary planner you will only see the main contact details. Once opening the appointment on diary planner you will be able to see the multiple invitees as well.

BluWave SOFTWARE [Getting Started](#) | [User Profile](#) | [Log Out?](#)

Home | **Activities** | Leads | Contacts | Companies | Opportunities | Reports | System Setup | Financials | List Manager

Add New Activity | Diary Planner | To Do List | Send Email | Add New Cycle | Cycle Planner

Search
Search:
Within: Please Select...

Quick Create
Please Select...

Calendar
February 2020
Mo Tu We Th Fr Sa Su
27 28 29 30 31 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 1
2 3 4 5 6 7 8
Last Invoice Date:

Add Activity Save Save & New Cancel

Appointment Details * = Required Fields

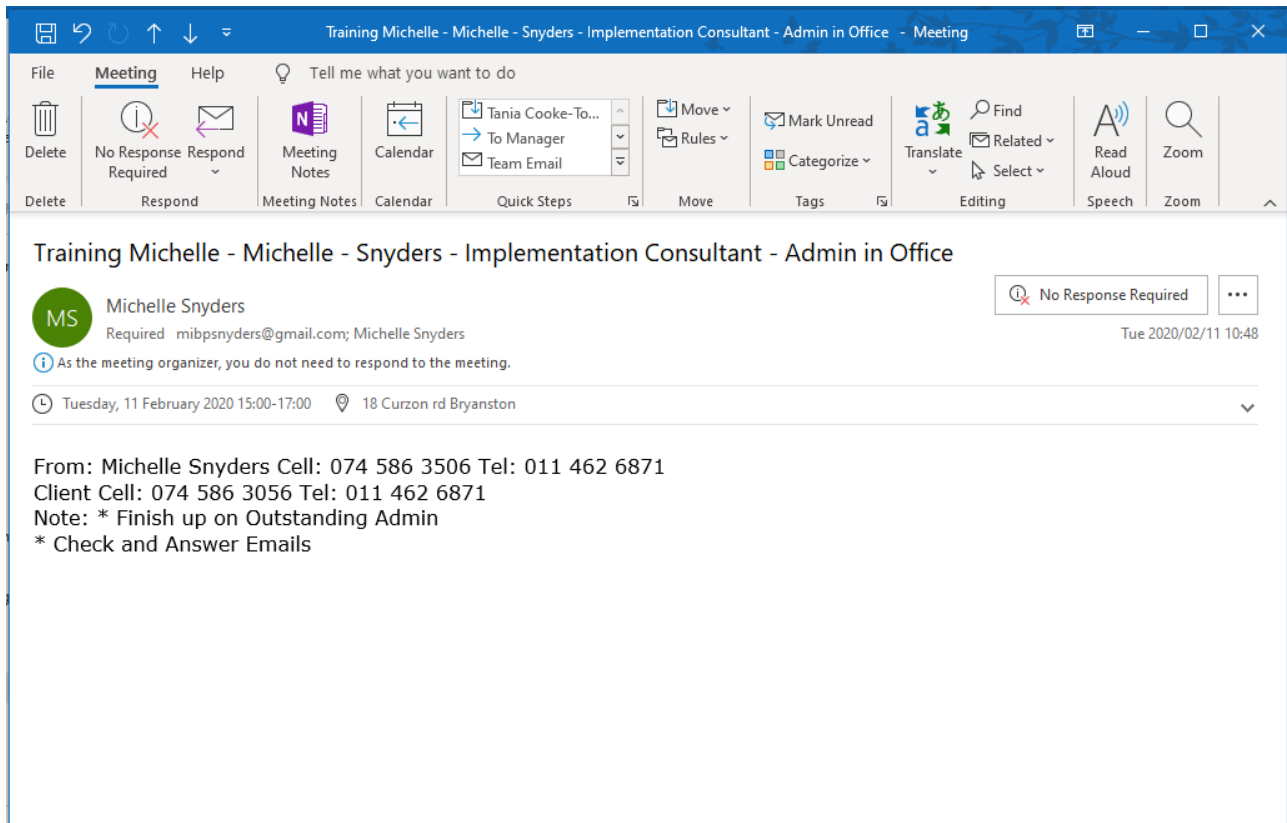
Sales Staff: Michelle Snyders
Company: Green Leaf *
Contact: Bobby Roots - Sales Rep - Influencer *
Location: 18 Curzon Road Bryanston View Map
Activity: Presentation *
Task? ☐ Product Usage
Start Date: 11/02/2020 14:00
End Date: 11/02/2020 17:00
Quote/Opp No.: Document Attach
Quote Status:
Note: Discuss new product range launched
Complete Activity? ☐ Current Location -26.0654996 28.0066806
Save Save & New Cancel

Invitees
patty@greenleaf.co.za
hansie@keller.co.za

4.1.3 Appointment Invitation Emailed to the Customer

If you had checked the invite customer checkbox then your customer will receive the following email from you.

Your customer can click on the attached Calendar file to accept the appointment into any .ics compliant calendar program including (but not limited to) MS Outlook Calendar, Lotus Notes Calendar, or Gmail Calendar.



4.2 Diary Planner



The Diary Planner is accessed from the **Activities** tab.

Alternatively, the **Diary Planner** can be accessed from the **Home Page**, by clicking on the **Go to Diary Planner** hyperlink.

These views show the appointments for the day in the bottom section and the tasks at the top in the grey section.

Access the different diary planner views using the tabs below. (**Day, Work Week, Week, Month & Timeline**)

Work Week View

Search

Search

Within

Quick Create

Please Select...

Calendar

February 2020

Mo Tu We Th Fr Sa Su

27 28 29 30 31 1 2

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 1

2 3 4 5 6 7 8

Last Invoice Date:

Show diary planner for: Michelle Snyders

Print Diary

< Today >

03 – 07 February 2020

Day Work Week Week Month Timeline

	3 Monday	4 Tuesday	5 Wednesday	6 Thursday	7 Friday
	Adams&Adams - fsgv - Book Training (4 Daventry Street Lynnwood Manor)	Training Michelle1 - Peter Gelden Mr - Sales Manager - Decision-Maker - Telephone Call (294 Theuns van Niekerk Street Wierdapark)	Green Leaf - Patty Morris - Sales Manager - Influencer - Email Sent	Green Leaf - Patty Morris - Sales Manager - Influencer - Arrange Cust Visit	Training Pieter - Pieter Bester - Presentation (17 Leslie Avenue Douglasdale)
07 00			Vodacom - Nicola Potgieter Ms - Branch Manager - Customer Survey	Green Leaf - Bobby Roots - Sales Rep - Influencer - Service Call	
08 00					
09 00		Training Michelle1 - Michelle Snyders (Left) - Application Consultant - Influencer - Presentation (294 Theuns van Niekerk Street Wierdapark)			Training Michelle1 - Michelle Snyders (Left) - Application Consultant - Influencer - Presentation (294 Theuns van Niekerk Street Wierdapark)
10 00					
11 00					
12 00	Green Leaf - Patty Morris - Sales Manager - Influencer - Presentation		Green Leaf - Patty Morris - Sales Manager - Influencer - Present		Agenda: New product range launched
13 00					

The **Work Week** view is the system default; it shows all booked activities for the working week hence it excludes Saturday and Sunday.

Right click on an empty time slot to create a **New Appointment** for that time or to create a **New Task**.

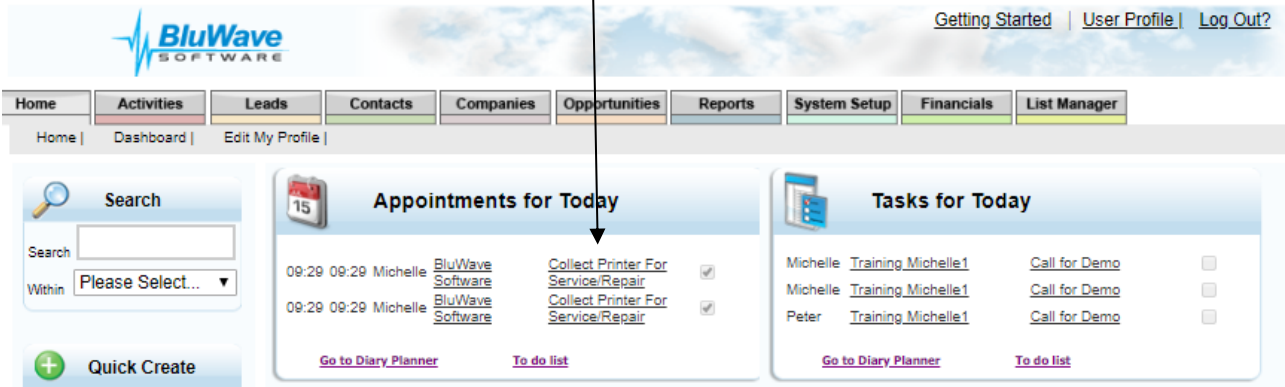
Note that the dotted blue line indicates the current time.

4.2.1 Alternate Views of the Diary Planner:

- **Day View**
This view shows all appointments and tasks that have been scheduled for a specific day.
- **Week View**
This view shows all scheduled appointments and tasks for the week and will include Saturday and Sunday.
- **Month View**
This view shows all the activities in the diary that have been scheduled, from the current week to the corresponding week in the following month.
- **Timeline View**
This view will show all scheduled appointments and tasks for a Ten-day period.

4.3 Edit an Activity

An activity can be accessed/ edited from the **Home** page, **Edit Company** page & **To Do List** page, by clicking on the **Activity Description**.



From the **Edit Company** page, you would expand the **Scheduled Activities** panel and click on the activity you wish to edit. It will open the same screen as below.

Contacts New					
Cycles New					
Scheduled Activities New					
	Date	Time	Activity	Sales Rep	Contact Note
Delete	06/02/2020	00:00	Arrange Cust Visit	Michelle Snyders	Patty Morris , Sales Manager , Influencer phone to book presentation for next week
Delete	10/02/2020	00:00	Telephone Call	Michelle Snyders	Bobby Roots , Sales Rep , Influencer phone to check on order
Completed Activities New					

Also note that the **New** links on the **Scheduled and Completed activity** panels will allow you to create a new activity for this client; the company name will be defaulted.

An activity can also be accessed/ edited from the diary planner (**Activities Tab**), by right-clicking on the activity and selecting the **Open Activity** option.

Show diary planner for: Michelle Snyders Print Diary

	3 Monday	4 Tuesday	5 Wednesday	6 Thursday	7 Friday
	Adams&Adams - fsgv - Book Training (4 Daventry Street Lynnwood Manor)	Training Michelle1 - Peter Gelden Mr - Sales Manager - Decision-Maker - Telephone Call (294 Theuns van Niekerk Street Wierdapark)	Green Leaf - Patty Morris - Sales Manager - Influencer - Email Sent	Green Leaf - Patty Morris - Sales Manager - Influencer - Arrange Cust Visit	Training Pieter - Pieter Bester - Presentation (17 Leslie Avenue Douglasdale)
07 00					
08 00					
09 00		Training Michelle1 - Michelle Snyders (Left) - Application Consultant - Influencer - Presentation (294 Theuns van Niekerk Street Wierdapark)			
10 00				10:04 - 10:30	
11 00					

Open Activity

Show Time As ▶

Label As ▶

✗ Delete

Once you have clicked on the **Open Activity** option, the **Edit Activity** page will open.

You will then be able to make the necessary change to the activity (to the date, notes or time, etc.).

Click on the **Update** button to save the changes made to the activity.

If you edit your appointment in BluWave, the system will edit your appointment in your local calendar. In addition, if your customer was invited, it will resend the email invite to the customer with the updated time and/or date.

Remember to check all the invite checkboxes if the customer should receive an updated meeting request.

Home | **Activities** | Leads | Contacts | Companies | Opportunities | Reports | System Setup | Financials | List Manager

Add New Activity | Diary Planner | To Do List | Send Email | Add New Cycle | Cycle Planner

Edit Activity [Update] [Update & New] [Cancel]

Appointment Details

Sales Staff: Michelle Snyders

Company: Training Michelle1 *

Contact: Peter Gelden Mr - Sales Manager - Decision- * ☐ Invite Contact?

011 608 3000 088 900 2010 peterg@trainingname.co.za

Location: 294 Theuns van Niekerk Street Wierdapark [View Map](#)

Activity: Demonstration

Task? ☐

Start Date: 12/02/2020 12:00

End Date: 12/02/2020 14:00

Date Created: 05/02/2020 Created By: Michelle Snyders

Quote/Opp No: [Dropdown] Document

Quote Status: [Dropdown]

Note: demo on companies product

☐ Not yet complete, Complete Now? ☐ Current Location -26.0654996 28.0066806

[Update] [Update & New] [Cancel]

Invitees

☐ peter@trainingmichelle.co.za

* = Required Fields

Search

Search: [Text Box]

Within: Please Select...

Quick Create

Please Select...

Calendar

February 2020

Mo	Tu	We	Th	Fr	Sa	Su
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	1
2	3	4	5	6	7	8

Last Invoice Date:

4.4 To Do List

The **To Do List** page will show all the open activities on the system up until today (by default).

To get to the **To Do List** page, click on the third sub tab under the **Activities** tab.

This page can also be reached by clicking on the **To Do List** hyperlink on the **Home Page**.

The screenshot displays the BluWave CRM interface. At the top, the navigation bar includes tabs for Home, Activities, Leads, **To Do List**, Companies, Opportunities, Reports, System Setup, Financials, and List Manager. Below this, a secondary bar contains links like 'Add New Activity', 'Diary Planner', 'To Do List', 'Send Email', 'Add New Cycle', and 'Cycle Planner'. The main content area is titled 'To Do List' and features a search bar, a 'Quick Create' button, and a calendar for February 2020. The activity list table has columns: Start Date, Task?, Company Name, Contact, Activity, Days, and a description. Activities are listed with dates ranging from 11/02/2020 to 04/12/2019. A date picker is open on the right, showing the date 11/02/2020. An arrow points from the 'To Do List' sub-tab in the top navigation bar to the page title. Another arrow points from the 'Send Invoice' link in the activity list to the 'Send Invoice' button in the activity details.

From this page you can edit an activity, by either clicking on the **Edit** link on the left of a line or by clicking on the **Activity Description**.

By clicking on the **Company Name**, you will be directed to the **Edit Company** page.

The **Up to and including date** can be changed to any date to show more or less records.

The Days columns shows how many days an activity is overdue or how many days in the future it is.

- A negative value (i.e. -1) – show how many days in the future the activity is due.
- A positive value (i.e. 2) – shows how many days overdue the activity is.
- A zero value (i.e. 0) – shows the activity is due today.

4.5 Completing an Activity

In order to complete an activity, the user would open/ edit an activity (as shown on the previous pages).

Once on the **Edit Activity** page, the user would make sure to type in their feedback on the activity (also known as a call report); that the **Complete** checkbox is ticked and then click on the **Update** button.

If a user edits an activity where the activity date (for tasks) and time (for appointments) is in the past, the system automatically checks the completed check box; this makes it easier for users to complete activities.

If however you edit an activity because the time or date of the appointment has changed and thus you change the date or time to a future date, the system will uncheck the complete check box.

If you are logging and completing an activity that happened in the past, but was not initially entered to the system, BluWave CRM will note that the activity's date and/or time is in the past and will once again auto complete it. It will also indicate that you are entering an activity that occurred in the past.

If an activity is changed to a task, the invite customer checkbox is unchecked.

Activities dated in the future will not be completed.

The **Update & New** button allows the user to complete the current activity and then book a new activity on that same company (essentially a Follow up activity).

4.6 New Note (Logging Unexpected Communication)

The **New Note** function was created to assist users when having to quickly log a telephone call, support call or even to just add additional information to the **Edit Company** page.

To add a New Note, go to the **Edit Company** page, and click on the **New Note** button.

The screenshot shows the 'Edit Company' page. At the top, there's a navigation bar with tabs like Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, Financials, and List Manager. Below this is a sub-navigation bar with links like Add Company, View Companies, Contract Pricing, Group Pricing, View Cycles, Price List, Generate Jobs, Assign Jobs, Post Collection, and Monthly Billing. The main content area is titled 'Edit Company' and contains a 'Company Detail' section. This section has two columns of fields. The left column includes Company Name (Grass Gardens), Sales Staff (Michelle Snyders), Category (Prospect), Type (Definite Interest), State (First Demonstration), Source (Marketing Promotion), Industry (Consultants), Area (PTA Eastern Suburbs), Payment Terms, Currency to Quote (Rand), and Price Factor (1). The right column includes Account Number, Group, Website, Staff (10), Number of Printers (1), Financial Year End (29/02/2020), Printer Type (Daisy-wheel), Main Application Use (Gift Card Printing), and Current Supplier (Cannon). A 'New Note' button is located at the top right of the form, highlighted with a red arrow.

This will direct you to the **Add Activity** page, with the following information already defaulted for you:

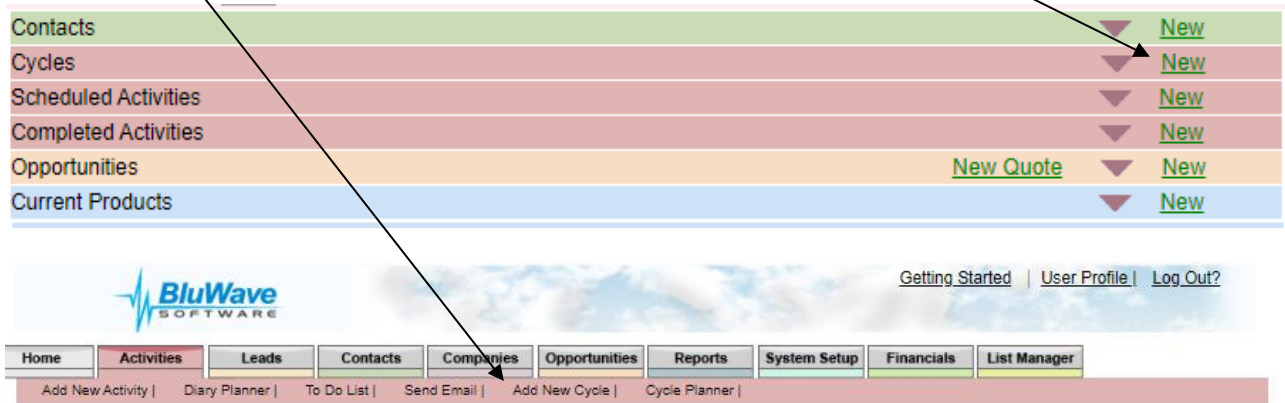
- The **Company** and **Contact** details (the user might need to select the correct contact person).
- The **Activity Description** (this will be according to your system settings).
- The **Date** and **Time** (already set to today with the time).
- The **Complete Activity** checkbox ticked (This will be ticked, as the system recognises the time and date to have occurred in the past).

The screenshot shows the 'Add Activity' page. At the top, there's a navigation bar with tabs like Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, Financials, and List Manager. Below this is a sub-navigation bar with links like Add Company, View Companies, Contract Pricing, Group Pricing, View Cycles, Price List, Generate Jobs, Assign Jobs, Post Collection, and Monthly Billing. The main content area is titled 'Add Activity' and contains an 'Appointment Details' section. This section has fields for Sales Staff (Michelle Snyders), Company (Grass Gardens), Contact (Gregg Ellis Mr), Location, Activity (Telephone Call), Task (checked), Start Date (11/02/2020), End Date (11/02/2020), Quote/Opp No, Quote Status, and Note. A red message states 'Activity is Scheduled in the Past, Defaulting to Completed'. A blue callout box explains that the user only needs to add feedback/notes to the Notes section and click the Save button. The 'Complete Activity?' checkbox is checked. The 'Current Location' is set to -26.0654996, 28.0066806. The 'Save' button is highlighted.

4.7 Cycles

4.7.1 Adding a Cycle

A cycle can be created by using the **Quick Create** dropdown; the **Cycle** panel on the **Edit Company** page; or the **Add New Cycle** sub tab under the **Activities** tab.



On the **Add Cycle** page the user would have the ability to either create a recurring task or a recurring appointment.

The 'Add Cycle' form is displayed. It has a title 'Add Cycle' and three buttons: 'Save', 'Save & New', and 'Cancel'. Below the title is a section for 'Service Cycles' with the following fields:

- Sales Staff:** A dropdown menu with 'Michelle Snyders' selected.
- Company:** A text input field with 'BluWave Software' and a magnifying glass icon for search.
- Contact:** A dropdown menu with 'Peter Burger' selected.
- Activity:** A dropdown menu.

 There are red asterisks next to the Company, Contact, and Activity fields. Below these fields is the 'Start Date' field with a date picker set to '11/02/2020' and a 'Duration' field set to '1 Minutes'.

 The 'Recurrence' section has two columns of radio buttons:

- Left column: Daily (selected), Weekly, Monthly, Yearly.
- Right column: Every 1 day(s) (selected), Every weekday.

 The 'Recurrence End' section has three radio buttons:

- No end date (selected)
- End after: 1 occurrences
- End by: 11/02/2020

 At the bottom are three buttons: 'Save', 'Save & New', and 'Cancel'.

Step 1: Select the **Company** (using the magnifying glass) and the correct Contact person.

Step 2: Select the recurring **Activity**.

Step 3: Decide whether this cycle should be a **task** or an **appointment**.

- For a Task only the Start Date would need to be populated (usually defaulted to today).
- For an Appointment the Start Date, Time and Duration of the Appointment would also need to be populated. (These appointments will not pull through to your outlook calendar)

Step 4: Select the relevant Recurrence settings.

4.7.1.1 Recurrence Options

Daily

☒ Daily
☐ Weekly
☐ Monthly
☐ Yearly

☒ Every day(s)
☐ Every weekday

This will create a daily activity that will appear in your diary planner as often as you have selected it to occur.

Weekly

☐ Daily
☒ Weekly
☐ Monthly
☐ Yearly

Recur every week(s) on:
☐ Mon ☒ Tue ☐ Wed ☐ Thu
☐ Fri ☐ Sat ☐ Sun

Select the days you want the activity to recur in a week and how often you want this reminder. (e.g. every 2 weeks). Multiple days can be selected.

Monthly

☐ Daily
☐ Weekly
☒ Monthly
☐ Yearly

☒ Day of every month(s)
☐ The of every month(s)

For monthly cycles, indicate which date/or day of the month you want so set the recurring activity for, as well as the monthly interval.

Yearly

☐ Daily
☐ Weekly
☐ Monthly
☒ Yearly

☒ Every
☐ The of

For yearly cycles, indicate the date/day and month the selected activity will recur.

Step 5: Select when the Recurrence should end.

☒ No end date
☐ End after: occurrences
☐ End by:

Set when you want the recurring activity to end. You can either set the activity to never end; set it to end after a particular number of occurrences; or set the specific date you want the activity to end.

Step 6: Click on the **Save** button to save this cycle.

4.7.2 Viewing/ Editing a Cycle

Once the Cycle has been saved and added to the system, that Cycle can then be found on the **Edit Company** page as well as on the **Diary Planner** page and the **To Do List** page.

4.7.2.1 From the Edit Company Page

From the **Edit Company** Page, the user would be able to view the Cycle created, by expanding the **Cycles** panel.

Edit Company

Company Detail

Company Name: Unitas Hospital
 Sales Staff: Michelle Snyders
 Category: Customer
 Type: Commercial
 State: Active Customer
 Source: Cold Call
 Industry: Laboratory
 Area: PTA Centurion
 Payment Terms:
 Currency to Quote: Rand
 Price Factor: 1
 Account Number:
 Group:
 Website:
 Staff: 5000
 Number of Printers: 500
 Financial Year End: 29/02/2020
 Printer Type: Ink-jet
 Main Application Use: Office Use
 Current Supplier: Konica-Minolta
 Opened: 17/01/2019

Cycles

Edit	Overdue	Next Date	Activity	Sales Rep	Contact	Note
Delete	Printer Check	11/02/2020	Printer Check	Michelle Snyders	Lily Hello	Printer Check

Scheduled Activities

To **Edit** the Cycle (the series), the user would click on the blue icon on the left of the cycle. This will direct the user to the **Edit Cycle** page, where the user can make the necessary changes (i.e. the recurrences or activity description).

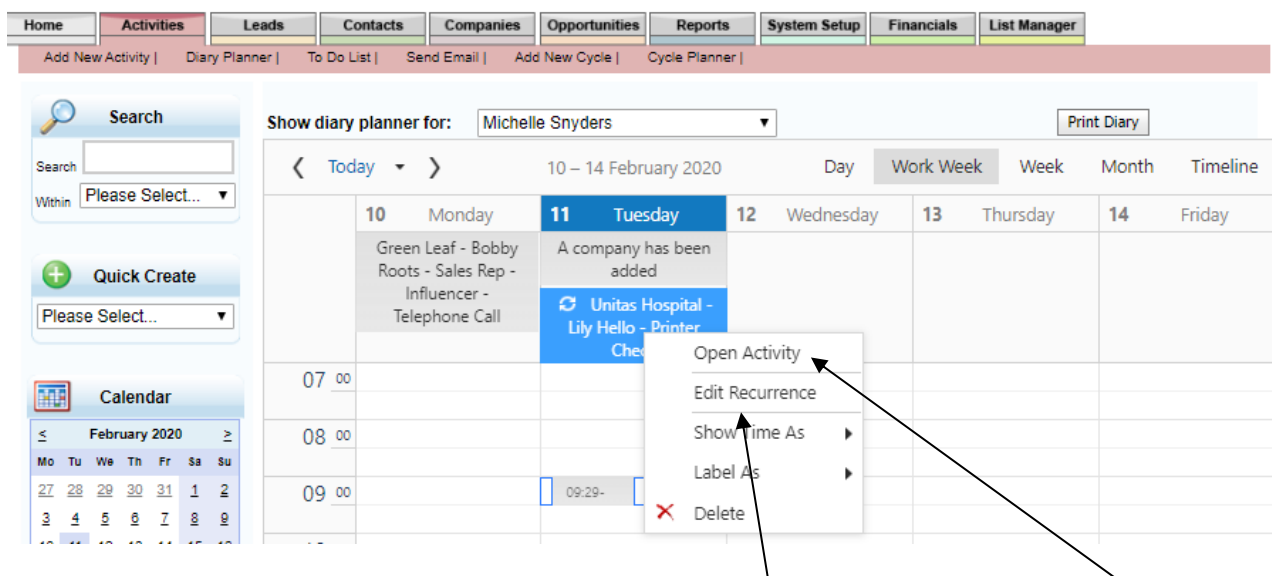
To Complete the Recurrence activity (one occurrence of the cycle), the user would click on the **Date** link in either the **Next Date** Column or the **Overdue** Column.

This will direct the user to the **Add Activity** page to add in their feedback or notes on the activity, and then click on the **Save** button to save the information to the system.

That activity will then appear in either the **Scheduled Activities** panel (if the user didn't complete the activity) or in the **Completed Activities** panel (if the user completed the activity) on the **Edit Company** page.

4.7.3.1 From the Diary Planner

The Cycles created will appear on the **Diary Planner** in either the Task section or the Appointment section, depending on their settings. All cycles will be displayed in Blue.



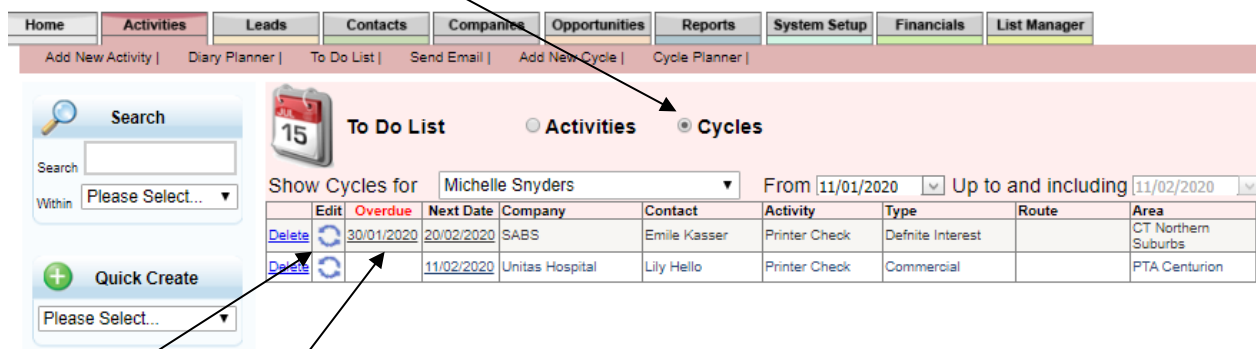
To **Edit** the Cycle (the series), the user would click on the **Edit Recurrence** menu option.

To Complete the Recurrence activity (thus one occurrence of the cycle), the user would click on the **Open Activity** menu option.

4.7.3.2 From the To Do List

From the **To Do List** page, the user would be able to see all the cycles that have an occurrence due.

On the **To Do List** page, click on the **Cycles** radio button to change the view of the **To Do List** page.



To **Edit** the Cycle (the series), the user would click on the blue icon on the left of the cycle. This will direct the user to the **Edit Cycle** page, where the user can make the necessary changes (i.e. the recurrences or activity description).

To Complete the recurrence activity (one occurrence of the cycle), the user would click on the **Date** link in either the **Next Date** Column or the **Overdue** Column.

This will direct the user to the **Add Activity** page to add in their feedback or notes on the activity, and then click on the **Save** button to save the information to the system.

5. Practical Activity

Please use the company you have created during the training session

The Activity will cover the following concepts:

- Adding a Contact person.
- Creating Activities (Task & Appointment).
- Completing Activities.
- Adding a Cycle.



Read through the whole activity before starting:

The company, Training Name (the one you created during the training), has appointed a new sales manager.

You will need to meet with the new sales manager and present a demo of your company's product in order to persuade him to purchase.

On Training Name's website, the new sales manager's details have been uploaded.

Peter Gelden

Sales Manager

Tel: 011 345 7890

Cell phone: 088 900 2010

Email: peterg@trainingname.co.za

Website: www.bluwave.co.za

Use the above details and create the following under the training company you just created during the training session:

1. Create Peter as a contact.
2. You need to set up an appointment with Peter for next week Wednesday to present a demo of your company's product (any time may be used).
3. After having an excellent presentation, Peter was interested, he had some queries where he wanted to know if the product could be ordered in bulk and could the colour of the one product be changed to bright pink.

Complete your appointment call report. **(For training purposes please change the appointment date that you created for next Wednesday to yesterday).**

4. Create a telephone call (task) that needs to be done in 3 working days.
5. Create a recurring activity with Peter where you need to visit him every second Friday for 4 occurrences (any time and duration may be used).

6. Email Functionality

6.1 Sending Emails from BluWave

BluWave CRM allows you send emails to your clients, which also saves a copy of the email sent under the **Completed Activities** panel of the client.

To send an email, click on the **Send Email** sub tab under **Activities** tab, or use the **Send Email** function available under **Quick Create**.

The screenshot shows the BluWave CRM interface. At the top, there are tabs: Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, Financials, and List Manager. Below these are sub-tabs: Add New Activity, Diary Planner, To Do List, Send Email, Add New Cycle, and Cycle Planner. The 'Send Email' sub-tab is highlighted. On the left, there is a 'Quick Create' menu with options: Please Select..., Appointment, Task, Company, Contact, Lead, Opportunity, Quote, **Send Email**, and Cycle. The 'Send Email' option is highlighted. In the background, a 'Show diary planner for: Michelle Snyders' calendar is visible, showing activities for Monday, Tuesday, Wednesday, Thursday, and Friday. Arrows point from the text in the previous block to the 'Send Email' sub-tab and the 'Send Email' option in the 'Quick Create' menu.

Alternatively, click on the **email address** hyperlink on the **Contacts** panel of the **Edit Company** page as shown below to email a specific contact person (which can also be found under the **Contacts** tab).

The screenshot shows the 'Edit Company' page for 'Green Leaf'. The page has a header with 'Edit Company' and buttons: Update, Cancel, Print Card, New Note, and Financials. Below the header is the 'Company Detail' section with various fields: Company Name (Green Leaf), Sales Staff (Michelle Snyders), Category (Prospect), Type (Enquiring Only), State (Enquiry), Source (Marketing Promotion), Industry (Automotive), Area (CT Eastern Suburbs), Payment Terms (Debit Order), Currency to Quote (Rand), Price Factor (1), and Price List (Price List 01). To the right of these fields are other fields: Account Number, Group (Bidvest), Website (www.bluwave.co.za), Staff (34), Number of Printers (23), Financial Year End (29/02/2020), Printer Type (Band), Main Application Use (Business Card Printing), and Current Supplier (Epson). At the bottom is the 'Contacts' panel with a table of contacts. The table has columns: Name, Tel, Cell, Category, Designation, and E-Mail. Two contacts are listed: Bobby Roots (Influencer, Sales Rep, bobby@greenleaf.co.za) and Patty Morris (Influencer, Sales Manager, patty@greenleaf.co.za). Arrows point from the text in the previous block to the 'Email address' hyperlink in the 'E-Mail' column of the contacts table.

	Name	Tel	Cell	Category	Designation	E-Mail
Delete	2 Bobby Roots	011 474 5664		Influencer	Sales Rep	bobby@greenleaf.co.za
Delete	1 Patty Morris	011 474 5664	074 586 3506	Influencer	Sales Manager	patty@greenleaf.co.za

Once on the **Send Email** page the user would need to add recipients to which the email should be sent to.

6.1.1 Adding Recipients to the Email

Step 1: Click on the **To**, **Cc** or **Bcc** button. All three these buttons will direct you to the **Add Email Recipients** page.

Step 2: Search for the company under which the contact person is saved, who you would like to email. Open the **Company Lookup** screen, by clicking on the **Magnifying Glass** icon.

Step 3: Type in the name of the company in the **Search** field and click on the **Go** button. You would need to type in at least the first two characters of the company name. Click on the **Select** link on the left of the appropriate company.

Step 4: Add the **Contact** to the relevant section of the email.

All the contacts at the selected company with an email address will display, select all the contacts that are to be included in the **To** section by ticking the checkbox and then clicking the **Add "To"** button. Repeat for **CC** and **BCC**.

The screenshot shows the 'Add Email Recipients' window. On the left, there are search and quick create options. The main area has two radio buttons: 'Company Contacts' (selected) and 'Internal Staff'. A search box contains 'Green Leaf'. Below this, a list of contacts is shown with checkboxes: 'Bobby Roots - Sales Rep' and 'Patty Morris - Sales Manager'. To the right of the list are buttons for 'Add "To"', 'Add "Cc"', and 'Add "Bcc"'. The 'Done' button is at the top right.

You may click the magnifying glass again to select additional companies to email if required.

Step 5: To include internal staff as recipients on the email, select the **Internal Staff** radio button and this will show a list of all the Users of your BluWave CRM system.

Add the required recipients, by ticking on their checkboxes and adding them to either **To**, **Cc** or **Bcc** section.

This screenshot shows the 'Add Email Recipients' window with the 'Internal Staff' radio button selected. The search box is empty. The list of internal staff members is displayed with checkboxes: 'Charmaine', 'Hansie Keller', 'Michelle Snyders', and 'Simphiwe Nkosi'. To the right of the list are buttons for 'Add "To"', 'Add "Cc"', and 'Add "Bcc"'. An arrow points from the 'Add Bcc' button to the email address 'hansie@keller.co.za;'. The 'Done' button is at the top right.

Step 6: Return to the **Send Email** page.

Make sure that all the intended recipients are listed on the right-hand side.

Once you are sure all the intended recipients have been added, click on the **Done** button at the top of the page.

6.1.2 Attaching a Document to the Email

After clicking on the **Attach** button, the **Document Management** page will open, and the user can then do one of two things:

1. Either **Upload a new file** to the system (Step 1 – 3 as described below) and select the document from the server (the bottom portion of document management page).
2. Or just **Select an existing file** from the server (the bottom portion of document management page).

To attach the required file to the form, the user would only need to find the specific file and tick the checkbox on the left side of the page (all the relevant files) and then click on the **Done, Return to Email** button.

Select	Uploaded	Folder	Sub Folder	Sales Rep	Description	File Name
<input type="checkbox"/>	03/02/2020	Company Docs		Michelle Snyders	waves_sea_water_stream_5037_2560x1440	waves_sea_water_stream_5037_2560x1440.jpg
<input type="checkbox"/>	29/01/2020	ServiceRequests	2020	Michelle Snyders	Quotes Issued Vs Target By Company for January 2020.pdf	Quotes Issued Vs Target By Company for January 2020.pdf

6.1.2.1 Uploading a New file to BluWave

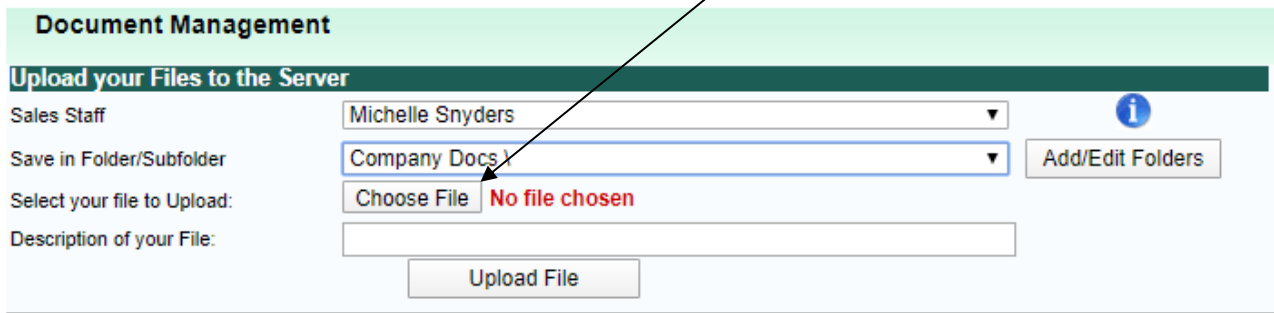
Step 1: Where to save the File on the Server

The user will choose under which **sales staff** and then which **folder** to save the file under on the secure Bluwave server.

Uploaded	Folder	Sub Folder	Sales Rep	File Description	File Name	Download	View	Delete
29/01/2020	ServiceRequests	2020	Michelle Snyders	Quotes Issued Vs Target By Company for January 2020.pdf	Quotes Issued Vs Target By Company for January 2020.pdf	Download	View	Delete

Step 2: Finding the File on the Users' Computer

After making these selections, the user would click on the **Choose File** button to search for the required file on their computer. Only files with a file size smaller than 8mb will be uploaded.



Document Management

Upload your Files to the Server

Sales Staff: Michelle Snyders

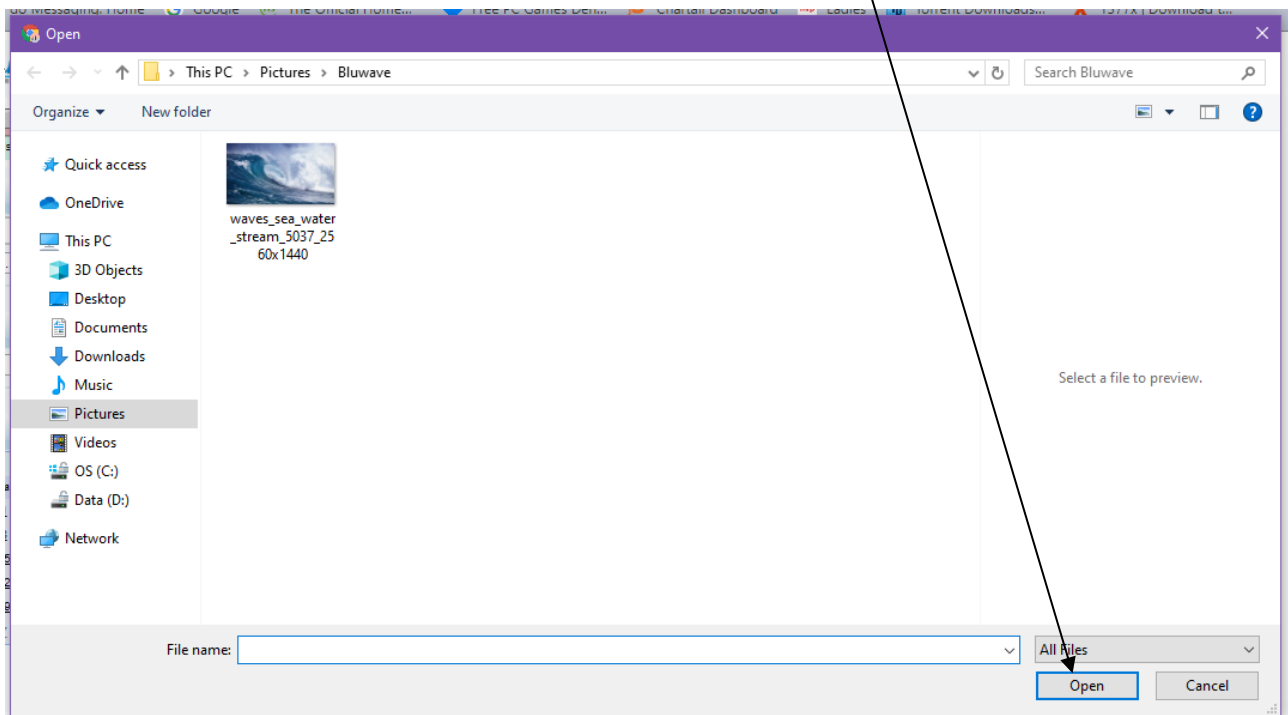
Save in Folder/Subfolder: Company Docs \

Select your file to Upload: **Choose File** No file chosen

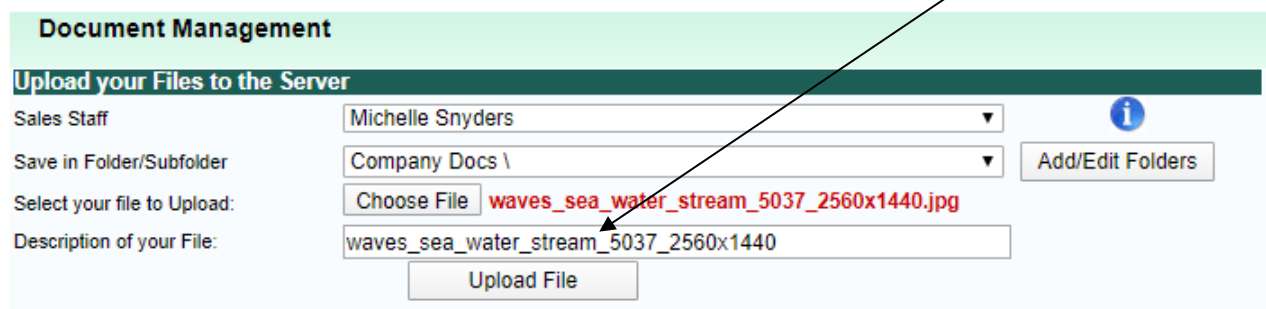
Description of your File:

Upload File

The user would then select the file on their computer and click on the **Open** button at the bottom of the screen.



After clicking on the **Open** button, the name of the file will appear in the **Description** field.



Document Management

Upload your Files to the Server

Sales Staff: Michelle Snyders

Save in Folder/Subfolder: Company Docs \

Select your file to Upload: **Choose File** waves_sea_water_stream_5037_2560x1440.jpg

Description of your File: waves_sea_water_stream_5037_2560x1440

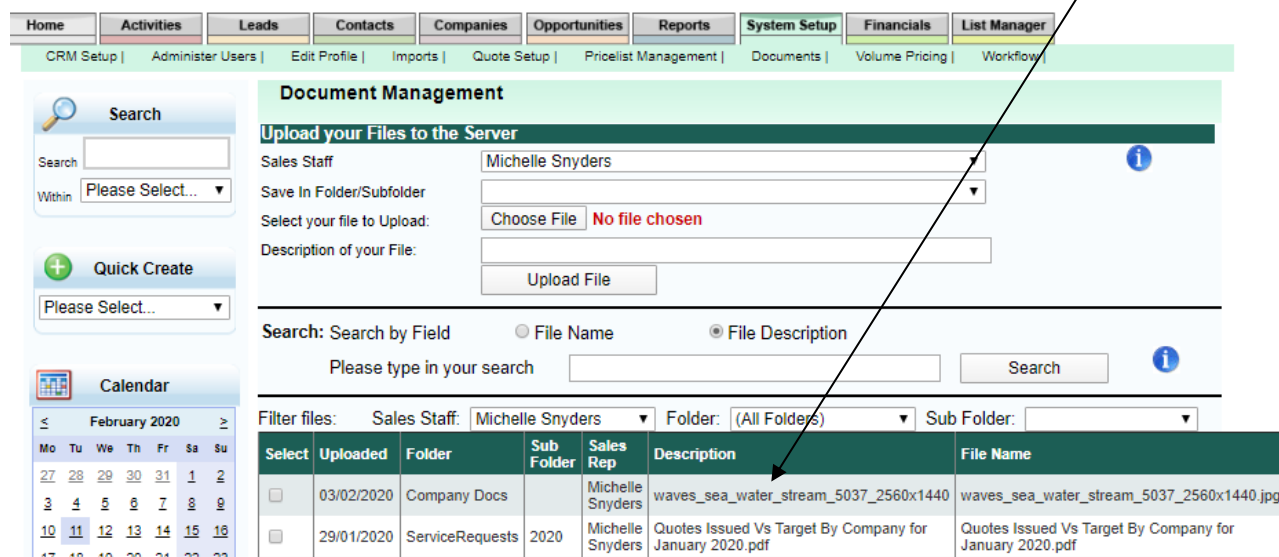
Upload File

The user could change the **Description** of the file or leave it as is.

Step 3: Uploading the File to the Server

Click on the **Upload File** button to save that file on our secure server.

Once the file is saved, the user will be able to view the file in the folder where they have saved it (in the bottom portion of the **Document Management** page).



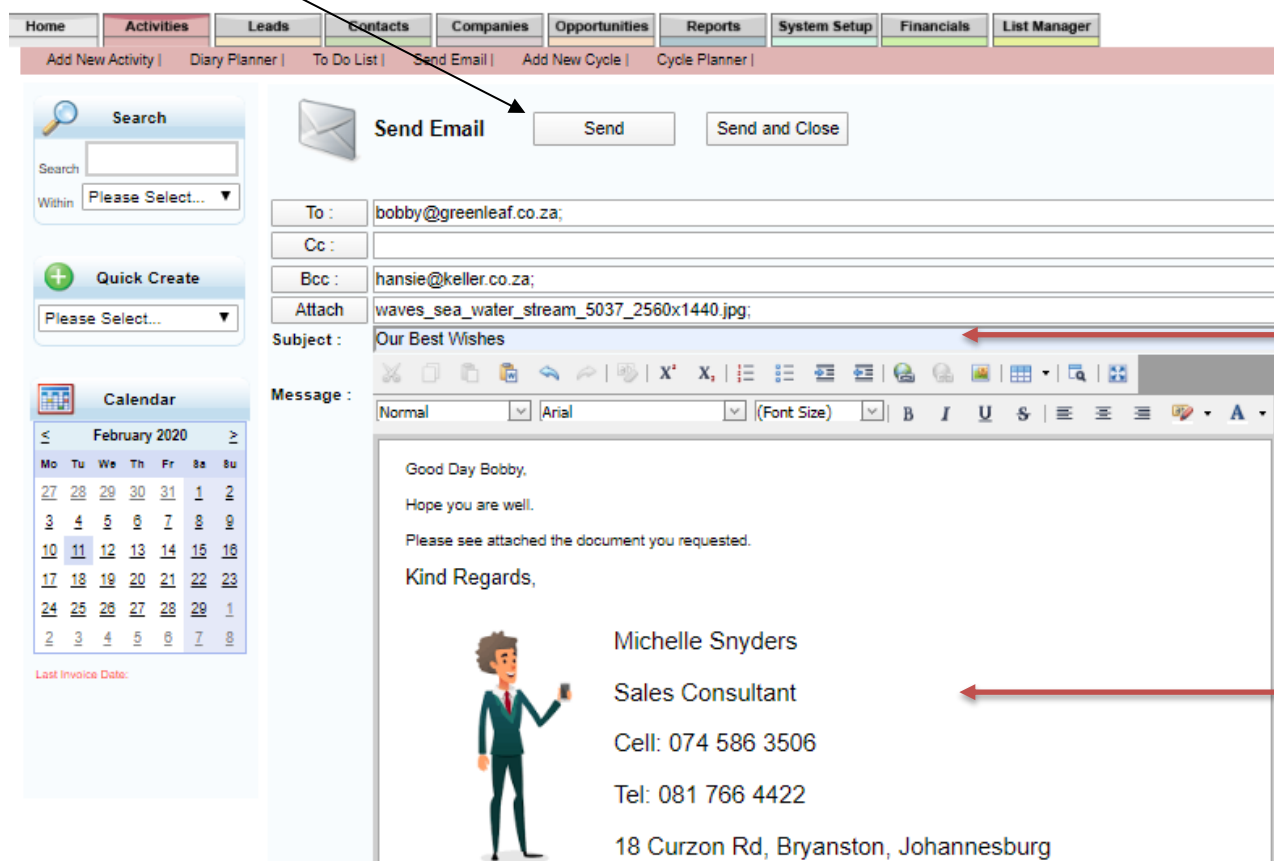
Select	Uploaded	Folder	Sub Folder	Sales Rep	Description	File Name
<input type="checkbox"/>	03/02/2020	Company Docs		Michelle Snyders	waves_sea_water_stream_5037_2560x1440	waves_sea_water_stream_5037_2560x1440.jpg
<input type="checkbox"/>	29/01/2020	ServiceRequests	2020	Michelle Snyders	Quotes Issued Vs Target By Company for January 2020.pdf	Quotes Issued Vs Target By Company for January 2020.pdf

6.1.3 Sending the Email

After adding the recipients and the relevant documentation (if applicable), the user would need to add in a **Subject** line. BluWave will not send an email without a subject line.

If the **user's email signature** is added to Bluwave, it will appear in the body of the email and the user would simply need to add their message to the body.

Click on the **Send** or **Send & Close** button to send the email.



To: bobby@greenleaf.co.za;

Cc:

Bcc: hansie@keller.co.za;

Attach: waves_sea_water_stream_5037_2560x1440.jpg;

Subject: Our Best Wishes

Message:

Good Day Bobby,
Hope you are well.
Please see attached the document you requested.
Kind Regards,

Michelle Snyders
Sales Consultant
Cell: 074 586 3506
Tel: 081 766 4422
18 Curzon Rd, Bryanston, Johannesburg

6.2 Email filing


You can also file emails from any email software program – either desktop email clients or web-based email client software including, but not limited to: Outlook, Lotus Notes, GroupWise, and Google Mail.

6.2.1 Saving an Outgoing Email

If you are sending an email from your email client to one of your contacts and want to record the email in BluWave, simply **BCC** the email to the following email address: emailfiling@bluwave.co.za.

BluWave CRM will then save the email as a completed activity under the client, with an Email Sent activity type.

NB: To save successfully, the contact person needs to be already loaded on BluWave with this email address.

 Send	To	michelle@hotmail.com
	Cc	
	Bcc	emailfiling@bluwave.co.za
	Subject	Follow up


Dear Contact

Hope you are well.

...


If you have any questions, please do not hesitate to ask.
Kind Regards

In **BluWave** the email will be shown in the **Complete Activities** panel on the **Edit Company** page with an **Email Sent** activity description:

Completed Activities							New	
Date	Time	Activity	Sales Rep	Contact	Note	Email	Attachment	
11/02/2020	00:00	Email Sent	Michelle Snyders	Michelle Sugerrush	Subject: Follow up Dear Contact Hope you are well. ... If you have any questions, please do not hesitate to ask. Kind Regards Michelle Snyders Implementation Consultant Bluwave Software Email: michelle@bluwave.co.za < mailto:michelle@bluwave.co.za > Cell: 074 586 3506 Tel: 011-462-6871 Fax: 011-462-6886			

6.2.2 Saving a Received Email

To save an email that you have received in your email client, **Forward** that email to emailfiling@bluwave.co.za.



Send

To

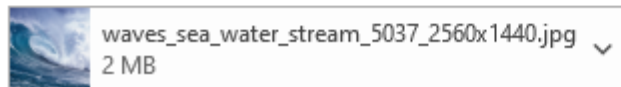
Cc

Bcc

emailfiling@bluwave.co.za

Subject

FW: Our Best Wishes



Ensure that the **First Email Address** in the body of the email, is the **Contact person's email address** (under which the email should be saved).

The user may have to remove their Email signature (as it may contain their own email address)

From: Michelle Snyders <mibpsnyders@gmail.com>
Sent: Tuesday, 11 February 2020 15:56
To: <bobby@greenleaf.co.za>
Subject: Our Best Wishes

Good Day Bobby,

Hope you are well.

BluWave CRM will then save the email as a completed activity under the company's **Completed Activities** panel as a completed activity under the client, with an **Email Received** activity description.

Again, the contact from whom the email was received from needs to exist on **BluWave CRM** with the email address that the message came from.

Completed Activities							New
Date	Time	Activity	Sales Rep	Contact	Note	Email	Attachment
11/02/2020	16:13	2 Email Received	Michelle Snyders	Bobby Roots , Sales Rep	Subject: Fwd: Our Best Wishes ----- Forwarded message ----- From: Michelle Snyders <mibpsnyders@gmail.com> <mailto:mibpsnyders@gmail.com> > Date: Tue, Feb 11, 2020 at 3:41 PM Subject: Our Best Wishes To: <bobby@greenleaf.co.za> <mailto:bobby@greenleaf.co.za> > Good Day Bobby, Hope you are well. Please see attached the document you requested. Kind Regards, Michelle Snyders Sales Consultant Cell: 074 588 3506 Tel: 081 766 4422 18 Curzon Rd, Bryanston, Johannesburg -- Have a Blessed Day Michelle Snyders 074 588 3506		

Please note that when email filing, that the attachments will not be filed.

7. Reports- Companies & Activities

7.1 New Companies Opened Reports



New Companies Opened Report

Date Created	Company Name	P/C/S	Type	Area	Source	Printer Type
Branch Description : Johannesburg						
Salesperson : Michelle Snyders						
State : Active						
11/02/2020	Captivation	P	Definite Interest	CT City Centre	Cold Call	Chain
Next Activity: 12/02/2020 Call for Demo						
Total for State : Active				1		
Total for Salesperson : Michelle Snyders				1		
Total for Branch : Johannesburg				1		

7.2 Activities Scheduled Report



Scheduled Activities Report

Branch Description :		Johannesburg			
Salesperson :		Michelle Snyders			
Activity Description :		Call for Demo			
12/02/2020	00:00	0 Mins	Captivation	Gary Schultz	
Call to Arrange Demo					
Total For Activity Type :		Call for Demo		1	
Activity Description :		Present Proposal			
14/02/2020	15:00	120 Mins	Captivation	Gary Schultz	
Present Solution					
Total For Activity Type :		Present Proposal		1	
Total For Salesperson :		Michelle Snyders		2	
Total For Branch :		Johannesburg		2	

7.3 Completed Activities Report

Completed Activities Report

Branch Description :		Johannesburg	
Salesperson :		Michelle Snyders	
Start	End	Company Name	Contact
Activity Description :		Book Training	
10/02/2020 00:00	10/02/2020 00:00	Adams&Adams	Gladyce Moore
new software training		Client agreed the training should be done- book for next week	
Total For Activity Type :		Book Training	1
Activity Description :		Telephone Call	
04/02/2020 00:00	04/02/2020 00:00	Training Michelle1	Mr Peter Gelden
client wants to know if he can order in bulk as well as if it comes in bright pink			
10/02/2020 00:00	10/02/2020 00:00	Green Leaf	Bobby Roots
phone to check on order		Client will send it to me tomorrow	
Total For Activity Type :		Telephone Call	2
Total For Salesperson :		Michelle Snyders	3

7.4 Overdue Activities Report

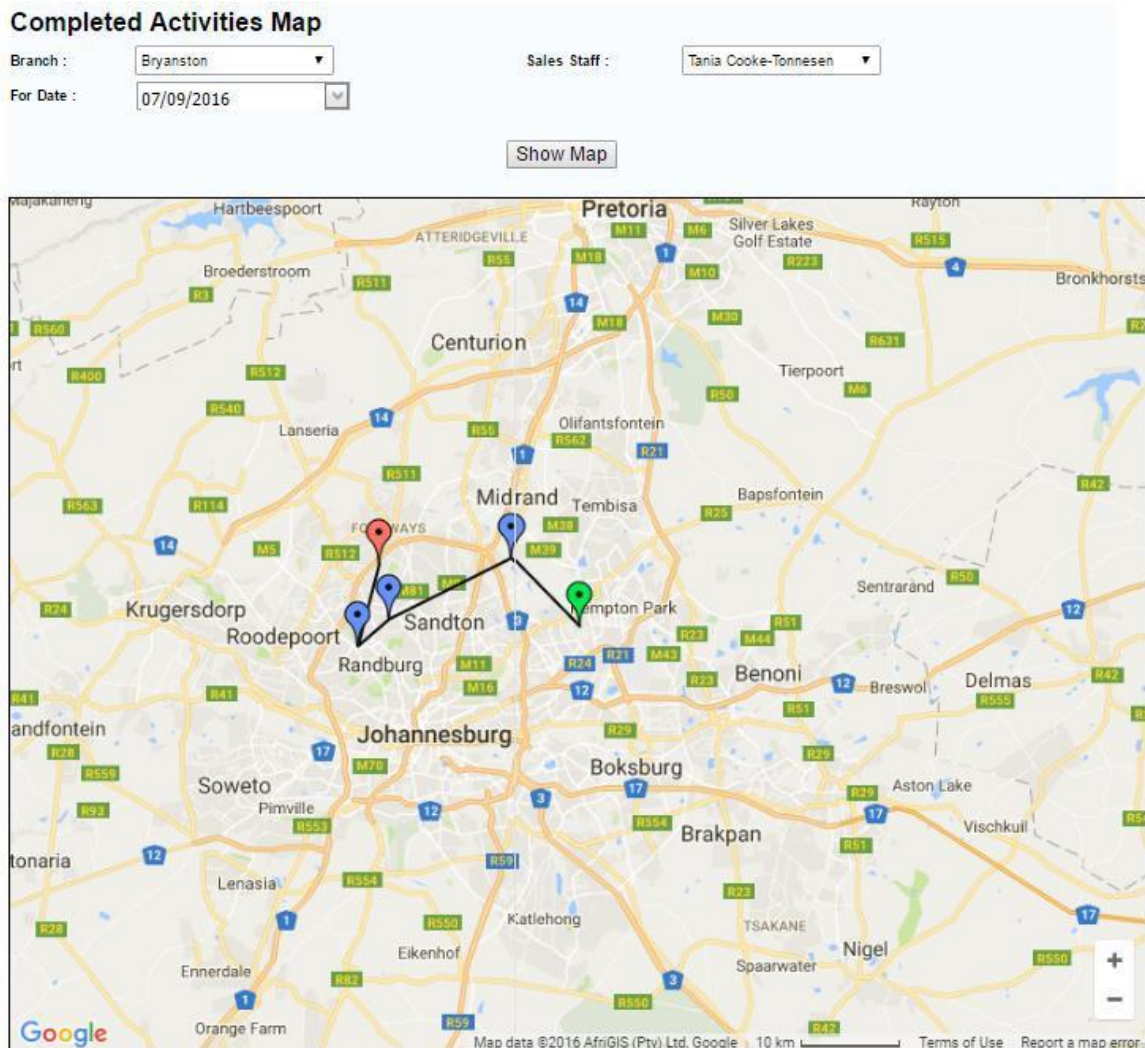


Overdue Activities Report

Branch Description : Johannesburg				
Salesperson : Thobanjalo Shangase				
Company Name	Contact	Activity	Start Date	Days Overdue
BluWave Software	Mr Dylan Cooke-Tonnesen	Quote Follow Up	17/05/2019	270
Afrox	Ms Stuart Lowe	Customer Survey	26/08/2019	169
kitty place	Cassy Darren	Deliver Contract	26/08/2019	169
Moloi Media	MR Dylan Cooke-Tonnesen	Collect Printer For Service/Repair	27/08/2019	168
Big 5 Guards	Mr Kendall Lowe	Cartridge Deliver/Change	28/08/2019	167
Chet Chemicals	Ms Karlien Oberholster	Printer Repair	29/08/2019	166
Explore.net	MR Ronald Durant	Collect Printer For Service/Repair	30/08/2019	165
Total Overdue Activities for :		Thobanjalo Shangase	7	
Total Overdue Activities for :		Johannesburg	7	

7.5 Location Tracking

When completing a Face-to-Face activity, the system will pick up your location at that time and store it. A report can be drawn that will show the locations of all these completed activities for a specific salesperson for a specified date.



7.6 Travel Claim Report

The system will also generate a travel claim report based on the location of your Face-To-Face activities.



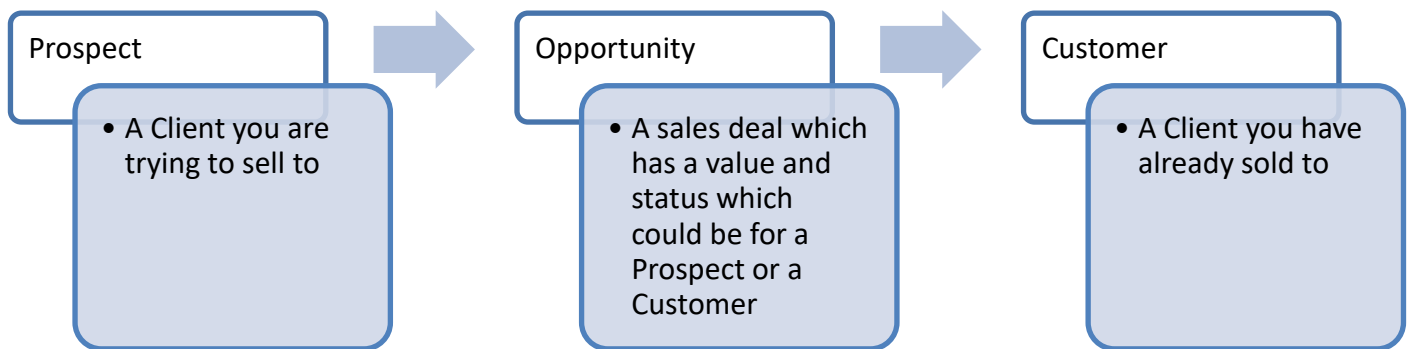
Travel Claim Report By Rep and Date

For Period : 01/02/2020 to 29/02/2020

* Indicates a difference of more than 1 km between the completed activity and the company.

Activity Date	Company Name	Contact	Activity	Distance(Km)	Cost
Branch Description :		Bryanston			
Sales Staff :		Tania Cooke-Tonnesen		Rate per Km: 2.50	
2020-02-03 14:00	Solo Resources	Geoff Naude	BluWave Consultation	4.4 *	11.00
2020-02-03 23:59	Office		Office	4.8	12.00
Total For Date :		1		9.1	23.00
2020-02-11 00:00	DO TECH	Shannon De Saint Pern	BluWave Consultation	11.6 *	29.00
2020-02-11 23:59	Office		Office	11.3	28.25
Total For Date :		1		22.8	57.25
Total For Rep :		2	Avg.Dist.: 15.98	32.0	80.25
Total For Branch :		2	Avg.Dist.: 15.98	32.0	80.25

8. Opportunity Tracking



Different Types of Statuses found on BluWave CRM



8.1 View Opportunities

By clicking on the **Opportunities** tab the **View Opportunities** sub tab will open by default. This page shows the list of Opportunities by their **Active, Sold, or Lost** statuses.

View Opportunities

Search Go! Filter: All Opportunities

☐ Company Name ☐ Opportunity Name

Enter at least the first 2 characters of the company name.

Views: ☒ Active ☐ Sold ☐ Lost

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

☒ Begins with (Opportunity Name) 'printer'

Company	Opportunity Name	Sales Staff	Pot. Value	Quote No	Exp	Status	Age
kitty place	Printer options	Michelle Snyders	525	1072	29/02/2020	Quote Stage	352
kitty place	Printer options	Michelle Snyders	100	1063	29/02/2020	Quote Stage	367
BluWave Software	Printer options	Michelle Snyders	250	1055	29/02/2020	Quote Stage	371
Random Comp	Printers	Michelle Snyders	10000	1053	29/02/2020	Quote Stage	372
kitty place	Printer Proposal	Michelle Snyders	4300	1031	29/02/2020	Quote Stage	458

The filters on the right can be used to access opportunities as follows:

- **All opportunities** - will display a list of all opportunities created on the system.
- **Recently Added** - will display only the last 5 added opportunities created on the system.
- **My opportunities** - will display a list of opportunities entered by the salesperson currently logged into the system.
- **Branch opportunities** - will display a list of opportunities for the branch the user is assigned to.
- **Closing this month** - will display all opportunities which have their expected order day set for the end of the current month.
- **Closing next month** - will display those opportunities with an expected order date set for the end of the next month.

Select Edit next to the relevant opportunity to open the opportunity.

8.2 Add an Opportunity

Click on **Add New Opportunity** to create a new sales opportunity. This can also be done from the **Edit Company** page/or the **Quick Create** menu.

On this page you will need to record the following information:

- **Sales Staff:** who is responsible for the opportunity.
- **Company & Contact:** which client and the specific contact the opportunity is listed under
- **Opportunity Name:** name given to the opportunity for internal reference and reporting purposes. (Will become the quote description).
- **Expected Order Date:** the date on which the sale is expected to be closed (defaulted to the end of the current month).
- **Product:** the main product which has been quoted(defaulted to quoted products).
- **Note:** Internal notes made for reporting purposes.
- **Attachment:** Used to attach an external quote, or any other document to the opportunity.
- **Status:** Where the opportunity is currently sitting in your pipeline.
- **Probability:** The likelihood of the sale being successful closed (0-100%).
- **Value:** Turnover value.
- **GP Value:** Gross Profit value (if required).
- **Next Activity & Activity Date:** First follow up booked for this opportunity and when it will occur.
- **Due Date:** The date the quote is due to be submitted to the client.
- **Quote Submitted:** The date the quote was sent to the client.

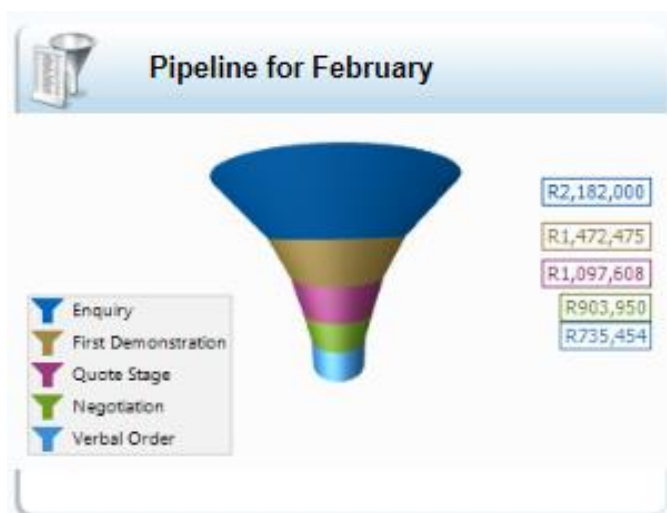
Click on the **Save** button to capture this opportunity and should you wish to create another opportunity (for the same client) click on the **Save & New** button. This will clear the page and allow you to enter the new opportunity's details.

8.3 Edit an Opportunity

On this screen the user can change the expected order date, enter the potential sale value and probability of this opportunity.

- The **status** field is used to monitor the opportunity's progress. This is very useful for reporting purposes.
- A file related to the opportunity can be attached if required (such as an external quote).
- Click on the **Update** button to save any changes.

Each salesperson can view his pipeline visually on his **Home Page**. Additional graphs on the salesperson's **Dashboard** details their progress against a target.



- The Opportunity Tracking functions to manage **New Business Acquisition**.
- Define your own sales process in order to track the progress of your sales pipeline.
- The system generates a new business forecast based on expected order dates and sales probability percentages.

9. Quote Automation

The **Quotes Automation** function generates a quote that can be emailed as a .PDF file to the customer.

When a quote is generated the system automatically creates a related opportunity in your sales pipeline and at the same time a follow-up activity (action item) is also generated.

Use the **New Quote** sub tab under the **Opportunities** tab to create a quote, alternatively use the **Quick Create** dropdown. You can also create a quote by clicking on the **New Quote** link under the Company's opportunity panel.

Use the New Quote sub tab to create a new quote.

The Quick Create dropdown also allows the user to create a new quote.

Company	Opportunity Name	Sales Staff	Pot. Value	Quote No	Exp	Status
Green Leaf	Printers- 6- Office Use	Michelle Snyders	12000	1148	29/02/2020	Enquiry
kitty place	Printer options	Michelle Snyders	525	1072	29/02/2020	Quote Stage
kitty place	Printer options	Michelle Snyders	100	1063	29/02/2020	Quote Stage
BluWave Software	Printer options	Michelle Snyders	250	1055	29/02/2020	Quote Stage

Alternatively, if you have already created an opportunity then use the **Create Quote** link on the **Add or Edit Opportunity** page.

The details entered onto the **Edit Opportunity** page will be automatically copied to Step 1 of the quote. You will be taken directly to Step 2.

Edit Opportunity [Update] [Cancel]

Opportunity Details

Sales Staff: Michelle Snyders Status: Enquiry

Company: Green Leaf Probability %: 20

Contact: Bobby Roots - Sales Re Value: 12000

Opportunity Name: Printers- 6- Office Use GP Value: 6000

Order No:

Expected Order Date: 29/02/2020 Next Activity: Telephone Call

Product: QP - Quoted Products Activity Date: 14/02/2020

Note:

Quote/Opp No: 1148

[Create Quote](#)

Quote Due:

Quote Submitted:

9.1 Step 1: Client Details

Complete the Quote Header details and then proceed to Step 2.

Company - Select the company for whom you are quoting by clicking on the **magnifying glass** button.

Contact person– select from list of contacts at this company.

Quote Status – select the current status of this opportunity (defaulted to **Quote Stage**).

Quote description – this is used as the subject line of the emailed quote. It should indicate what product/ service the client is being quoted on.

Expected Order Date – Date when you expect to get the order. This defaults to the last day of the current month, but should be changed if the sales is expected at a future date.

Probability – A percentage to indicate the likelihood of making the sale.

Delivery – Allocated time for delivery of products (will only appear on the quote if it has been entered during system setup).

Quote No – the system will insert the next available quote number onto the quote as soon as you start editing and updating the quote.

Validity – shows how long the quote is valid for, hence affecting the expiry date.

Follow up Activity– select the activity and date on which the initial follow up on the quote should take place.

Currency to Quote/ Rate of Exchange – Select the currency you wish to quote in, and the rate of exchange from the list. These must be configured under the System Setup beforehand; the system will automatically default to the system currency.

Payment Terms – Select the payment terms from the list. These also must be created under System Setup.

Click on the Continue to Step 2 button once done.

9.2 Step 2: Add the Quote Items

Select a Product Group – if you make a selection from this dropdown, then the product code and product description dropdowns will be filtered by the selected group. If you do not select a group, the product code and product descriptions drop downs will contain all products.

Select a Product Code or Product Description – select the item you wish to quote using either the product code or descriptions drop down.

Quantity – Enter the number of items you are quoting on. This should be adjusted before moving on to make changes to the price fields.

Price – The cost price (if set up on the product list) and selling price will show here.

Factor – The factor allows you to inflate the price of the product to cover for risks that are not accommodated for in the products costs. E.g. when transporting goods to another country, you may use a factor of 1.2 to inflate the price by 20 %.

Discount – Enter a discount percentage to be offered on the line item and this will be subtracted from the price.

Narrative - The product Narrative will display if it has been set up. You can customize the narrative here if you wish to change it for this particular quote.

If there are any **attachments or pictures** associated with the selected product in the price list, the checkboxes to the left of the Narrative field will be checked. The user can then decide to leave them checked (which will send the attachment to the client or insert the picture into the quote) or to untick the checkbox and remove the attachment from the email and not insert the picture into the quote.

Click on the Add To Quote button ... This will insert the product onto the quote and display it at the bottom of the page.
Continue to add all the items you wish to have on the quote.

Before proceeding with the quote, the following should also be completed:

Heading – This is a short description of what type of products are included in this specific paragraph.

Include Offer in Potential Value? – Ticking this checkbox will include the total value of this offer into the potential value of the quote on the pipeline.

Include Offer Total in Quote? – Ticking this checkbox will show the Total section for this offer on the output of the quote.

Include Line Values on Quote? – Ticking this checkbox will show each items' price and total value for this offer on the output of the quote.

9.2.1 Inserting a Pic on the Quote line

Users can insert a picture into the quote from the quote line and in addition add the picture to the pricelist (if there isn't one yet).

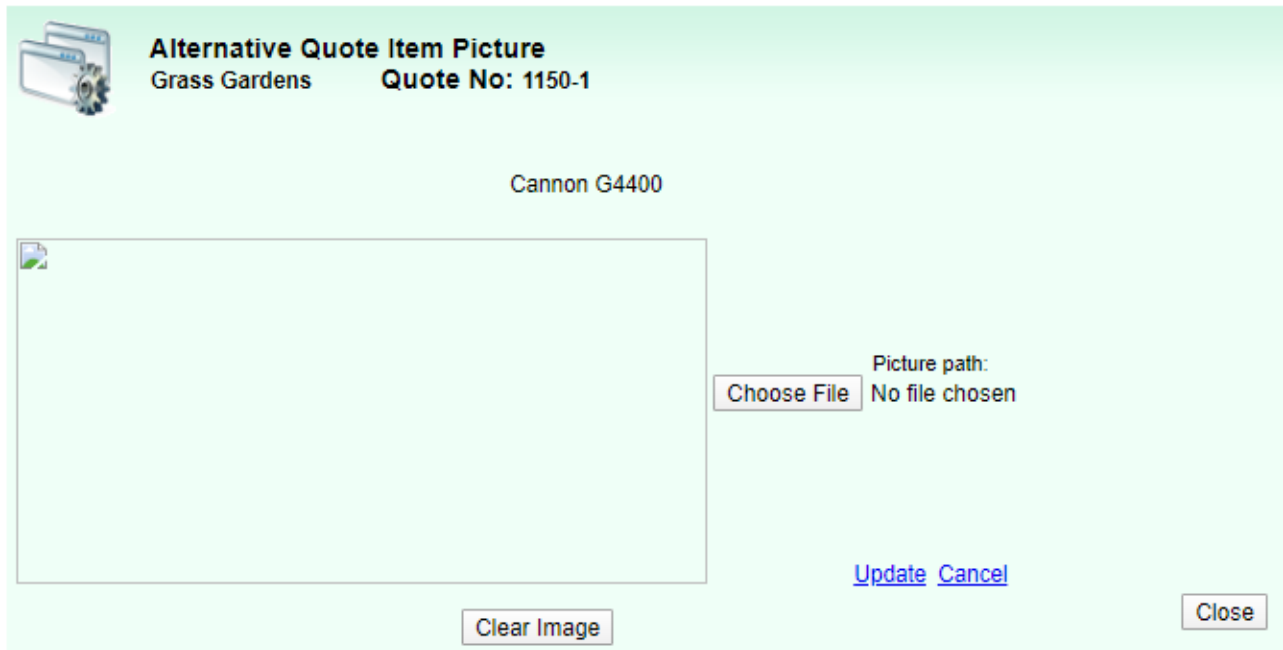
If there is no picture saved in the pricelist, the user would be able to add it to the pricelist (if they have system setup rights) or otherwise the user would be able to insert a picture (or replace the existing picture already saved in the pricelist) on that specific line item for that specific quote only.

Step 1: After inserting the quote items- click on the button **Pic**

No. of Quoted Items: 2							Continue to Step 3
Code	Description	Qty	Price	Disc.%	Narrative	GP%	Alt. Pic
Delete Can1	Cannon G4400	8	R	3400.00	0	This printer is available in the following colours: Pink, Red, Blue.	28 Pic
Delete 2019PPINKBLK	Black Tub - Printing Press	8	R	4000.00	0		16 Pic

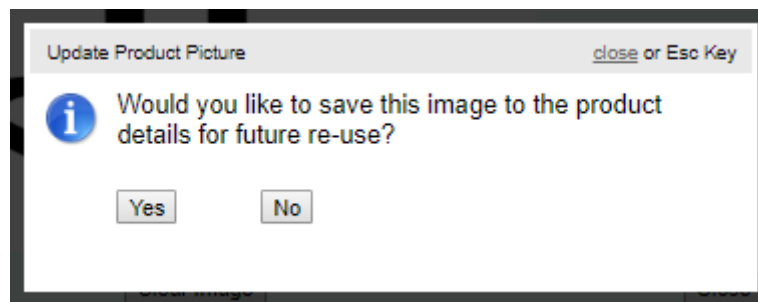
Step 2: The add image screen will then allow the user to either view, clear the image or edit/ add in a new image. Click on the **Edit** link to replace the image.

Step 3: The system will then allow the user to then select an image from where it is saved on a computer. To do this click on **Choose File**.



Once an image is chosen the picture path will be displayed next to the **Choose File** button.

Step 4: Click on the **Update** button. If the user has system setup rights and there is no previous picture added to the pricelist, the user will see the next dialogue box. Clicking on **Yes** will save the picture towards the line item for future use



Once the user has chosen **Yes** or **No**, the user would be able to either clear the image, edit the image or close this screen to return to the quote steps.



Some specification regarding the image:

- ❖ Maximum Size- 100kb
 - ❖ Accepted Format- .jpeg/ .jpg/ .png
 - ❖ Aspect Ratio- Width of 200 pixels
- (the image would be set to keep the aspect ratio and be proportionally resized, and the system will keep the width at 200px)

Click on the **Close** button to return to Step 2 of the quote process.

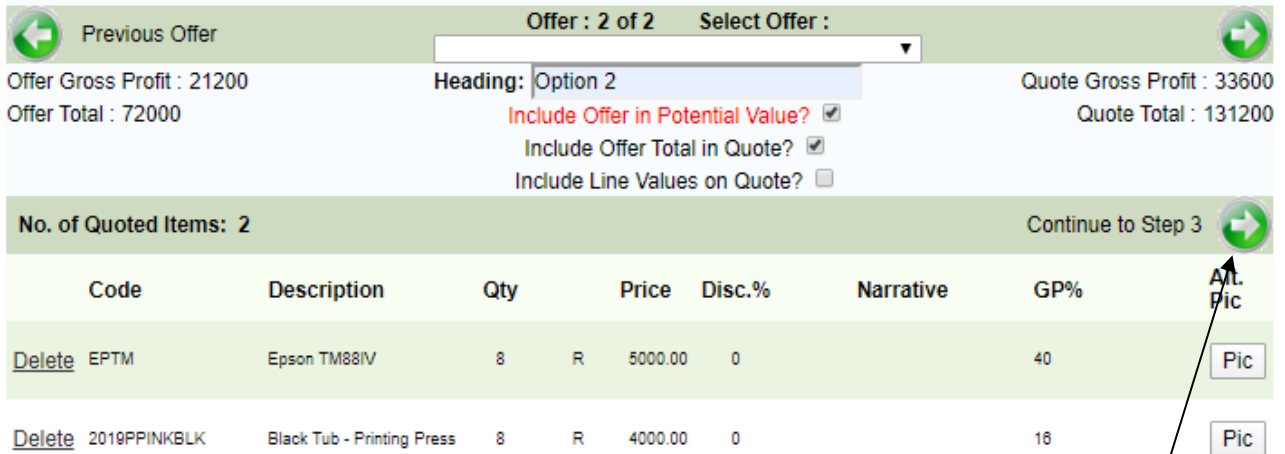
9.2.2 Adding Additional Offers

You can have multiple offers on the same quote.

Clicking on the **Next Offer** button will allow you to create a new offer on the same quote.

This can be used to supply the client with different options to choose from, or alternatively to show the difference between certain products such as hardware and installation.

Repeat the previous steps to add line items to the second offer and this will also show on the final quote under a different heading.



Offer : 2 of 2 Select Offer :

Offer Gross Profit : 21200 Heading: Option 2 Quote Gross Profit : 33600
Offer Total : 72000 Include Offer in Potential Value? ☒ Quote Total : 131200
Include Offer Total in Quote? ☒
Include Line Values on Quote? ☐

No. of Quoted Items: 2 Continue to Step 3

Code	Description	Qty	Price	Disc.%	Narrative	GP%	Alt. Pic
Delete EPTM	Epson TM88IV	8	R 5000.00	0		40	Pic
Delete 2019PPINKBLK	Black Tub - Printing Press	8	R 4000.00	0		16	Pic

Once you have added in all the intended products to the different offers, click on the **Continue to Step 3** button...

9.3 Step 3: Finalizing the Quote

This step lists all the quoted items with a quote total. Multiple offers can also be viewed here and you are able to edit or delete line items from the quote, as well as change the sequence in which line items appear.

Step 3 will also show the Quote Header details as they were on Step 1 to allow you to change details e.g. Delivery should this be necessary.

Quote Details - STEP 3

Quote Details * Required Fields Process Order

Quoted By: Michelle Snyders
Company: Grass Gardens
Contact: Gregg Ellis Mr
Quote Status: Quote Stage
Quote Description: 8 Office Printers
Exp Order Date: 29/02/2020
Probability %: 10
Delivery: 2 - 3 weeks
Payment Terms: 30 Days
Template: Johannesburg
Approval Mgr.:
Quote No/Date: 1150 13/02/2020
Valid For: 14 Days
Expires on: 27/02/2020
Follow up Activity: Quote Follow Up
Follow up Date: 18/02/2020
Show Rebate?:
Show Discount?:
Combine Offer Totals?:
Row Shading:
Currency to Quote: Rand
ROE: Rand
Approval Note:

Exp Order Date: 29/02/2020
Probability %: 10
Delivery: 2 - 3 weeks
Payment Terms: 30 Days
Template: Johannesburg
Approval Mgr.:
Quote No/Date: 1150 13/02/2020
Valid For: 14 Days
Expires on: 27/02/2020
Follow up Activity: Quote Follow Up
Follow up Date: 18/02/2020
Show Rebate?:
Show Discount?:
Combine Offer Totals?:
Row Shading:
Currency to Quote: Rand
ROE: Rand
Approval Note:

Back to Step 2 (Add Items) Recalculate Terms Select Offer: 1:Op Copy this Offer Save & Preview Quote

#	Product	Description	Qty	Cost	Price	Disc%	Net.Price	GP%	Total	Att
1	Can1	Cannon G4400	8	R 2500.00	R 3400.00	0	R 3400.00	26	R 27200.00	
This printer is available in the following colours: Pink, Red, Blue.										
2	2019PPINK BLK	Black Tub - Printing Press	8	R 3350.00	R 4000.00	0	R 4000.00	16	R 32000.00	

Show VAT ☒ 15

Total	R	59200.00
VAT	R	8880.00
Grand Total	R	68080.00

Edit Cover Letter – This button will allow the user to choose from an existing cover letter to add it to the quote. The user would also be able to make changes to the cover letter before saving it to the quote.

Template – One or more templates could have been setup for your company. You need to choose the required template for this specific quote. Templates will have different header and footer images and header and footer paragraphs.

Term Sets – In cases where you will have multiple terms and conditions you can select the correct one

Optional Terms and Conditions - can be added to the quote by selecting them from the Terms button. This will have to be preloaded by the system administrator.

Approval Manager – If any quote requires approval before being sent to the client, you are able to select an approval manager from this dropdown.

Back to Step 2 - Allows you to add more quote items

Offers - View the different offers by selecting the required one from the dropdown.

Currency to Quote or Rate of Exchange - Should these change, use the **Recalculate** button to refresh the price and the currency symbol.

VAT - Uncheck the check box to exclude VAT from the quote or leave it checked to include it.

Copy this Offer – this allows the user to copy one offer and create a duplicate in a new offer. The user would then be able to make changes to that offer.

Click on the **Save & Preview Quote** button to generate the quote.

9.3.1 Copy Offer Function

Users can duplicate quote offers on the quote. The purpose could be to make minor changes to an alternative option that the client could choose from.

Click on the **Copy this Offer** button on Step 3 of the Quote process.

#	Product	Description	Qty	Cost	Price	Disc%	Net.Price	GP%	Total	Att
1	Can1	Cannon G4400	8	R 2500.00	R 3400.00	0	R 3400.00	26	R 27200.00	<input type="checkbox"/>
This printer is available in the following colours: Pink, Red, Blue.										
2	2019PPINK BLK	Black Tub - Printing Press	8	R 3350.00	R 4000.00	0	R 4000.00	16	R 32000.00	<input type="checkbox"/>

Show VAT <input checked="" type="checkbox"/> 15	Total R 59200.00 VAT R 8880.00 Grand Total R 68080.00
---	---

Please note that the current offer the user is viewing will be duplicated. (In this example it is offer 1).

The system will require confirmation from the user to continue with the duplication.

www.bluwavecrm.co.za says

Are you sure you want to Copy this offer?

OK Cancel

To confirm, the user will click on the **Ok** button.

The user will then be directed to the newly created offer. As can be seen below it is now offer 4 but has the same heading as the offer it was duplicated from.

Back to Step 2 (Add Items) Recalculate Terms Select Offer : 4:Op Copy this Offer Save & Preview Quote

#	Product	Description	Qty	Cost	P	Net.Price	GP%	Total	Att
1	Can1	Cannon G4400	8	R 2500.00	R	3400.00	26 R	27200.00	
2	2019PPINK BLK	Black Tub - Printing Press	8	R 3350.00	R	4000.00	16 R	32000.00	

This printer is available in the following colours: Pink, Red, Blue.

Show VAT ☒ 15

Total	R	59200.00
VAT	R	8880.00
Grand Total	R	68080.00

The user would then need to click on the **Back to Step 2** button to make any changes to the products included in the offer and to rename the offer.

The user would choose to view the correct offer, from the dropdown list of offers.

Previous Offer Offer : 4 of 4 Select Offer : 4:Option 1 Next Offer

Offer Gross Profit : 12400
Offer Total : 59200

Heading: Option 1

Include Offer in Potential Value? ☒
Include Offer Total in Quote? ☐
Include Line Values on Quote? ☒

Quote Gross Profit : 74000
Quote Total : 242400

No. of Quoted Items: 2 Continue to Step 3

Code	Description	Qty	Price	Disc.%	Narrative	GP%	Alt. Pic
Can1	Cannon G4400	8	R 3400.00	0	This printer is available in the following colours: Pink, Red, Blue.	26	Pic
2019PPINKBLK	Black Tub - Printing Press	8	R 4000.00	0		16	Pic

The user will then be able to make changes to the products and rename the offer appropriately, in this example the offer could be renamed to "Option 4".

Click on the **Continue to Step 3** button to continue with the quote process. On **Step 3** of the quote process the user would be able to make changes to the quantities, narratives, and pricing of the products by clicking on the **Edit** link next to the products.

Back to Step 2 (Add Items) Recalculate Terms Select Offer : 4:Op Copy this Offer Save & Preview Quote

#	Product	Description	Qty	Cost	Price	Disc%	Net.Price	GP%	Total	Att
1	Can1	Cannon G4400	8	R 2500.00	R 3400.00	0	R 3400.00	26 R	27200.00	
2	2019PPINK BLK	Black Tub - Printing Press	8	R 3350.00	R 4000.00	0	R 4000.00	16 R	32000.00	

This printer is available in the following colours: Pink, Red, Blue.

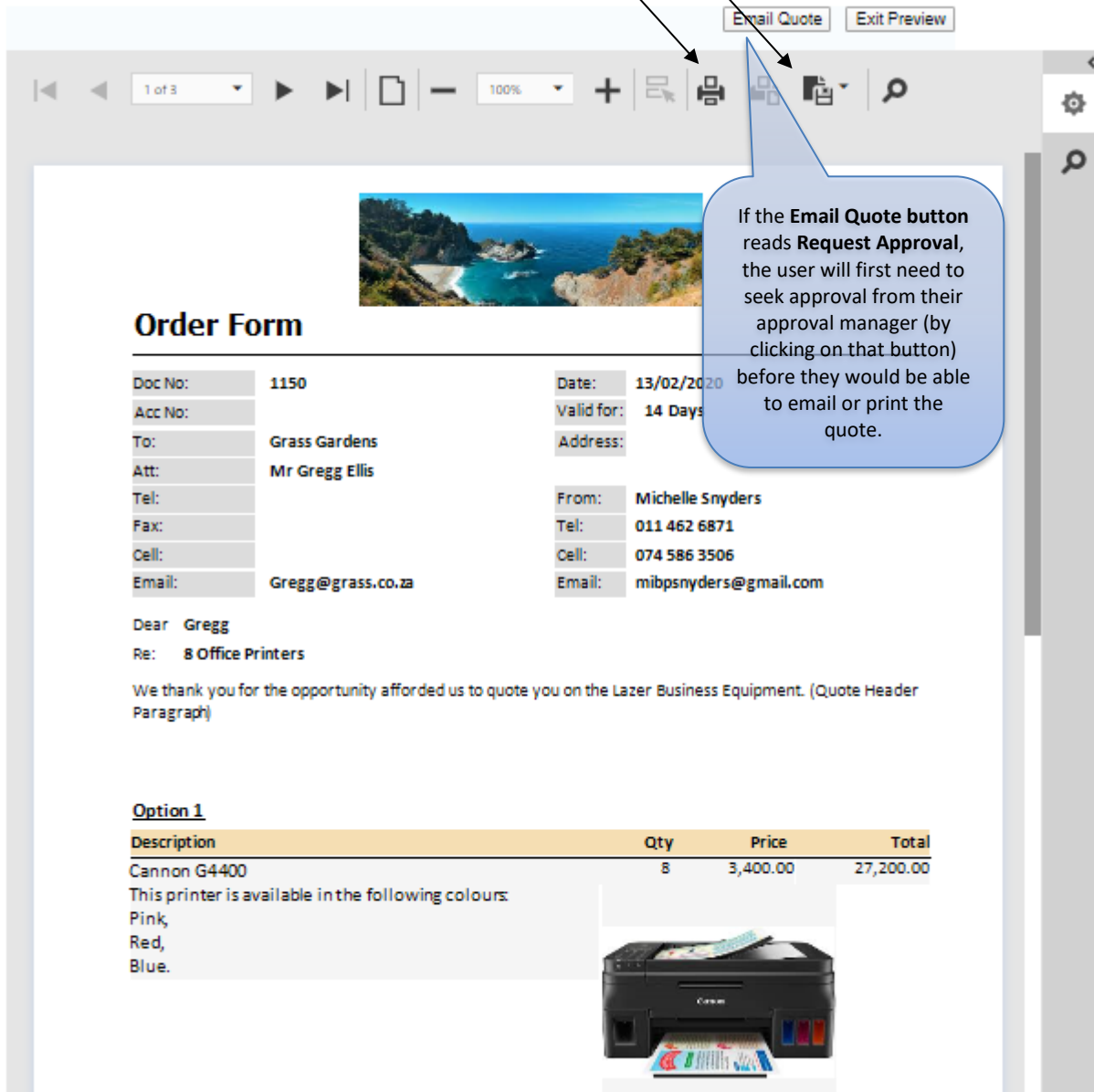
Show VAT ☒ 15

Total	R	59200.00
VAT	R	8880.00
Grand Total	R	68080.00

9.4 Step 4: Preview the Quote

From the **Preview** page the user can scroll down to view the quote (Please see the appendix A for an example of the quote output)

The user can also use the buttons at the top to either **print, export or email** the quote.



Order Form

Doc No: 1150 Date: 13/02/2020
 Acc No: Valid for: 14 Days
 To: Grass Gardens Address:
 Att: Mr Gregg Ellis
 Tel: From: Michelle Snyders
 Fax: Tel: 011 462 6871
 Cell: 074 586 3506
 Email: Gregg@grass.co.za Email: mibpsnyders@gmail.com


Dear Gregg
 Re: 8 Office Printers

We thank you for the opportunity afforded us to quote you on the Lazer Business Equipment. (Quote Header Paragraph)

Option 1

Description	Qty	Price	Total
Cannon G4400	8	3,400.00	27,200.00

This printer is available in the following colours:
 Pink,
 Red,
 Blue.



Click on the **Exit Preview** button if you wish to return to Step 3 of the Quote process.

9.5 Quote Approval

9.5.1 What is required from the User

If a quote requires approval, the user would not be able to email or print the quote without approval.

On Step 3 of the Quote process, the user would need to make sure their **Approval Manager** is selected and if they want, they can enter an approval note to the approval manager.

They can then preview their quote to make sure it is correct, by clicking on the **Save & Preview Quote** button.

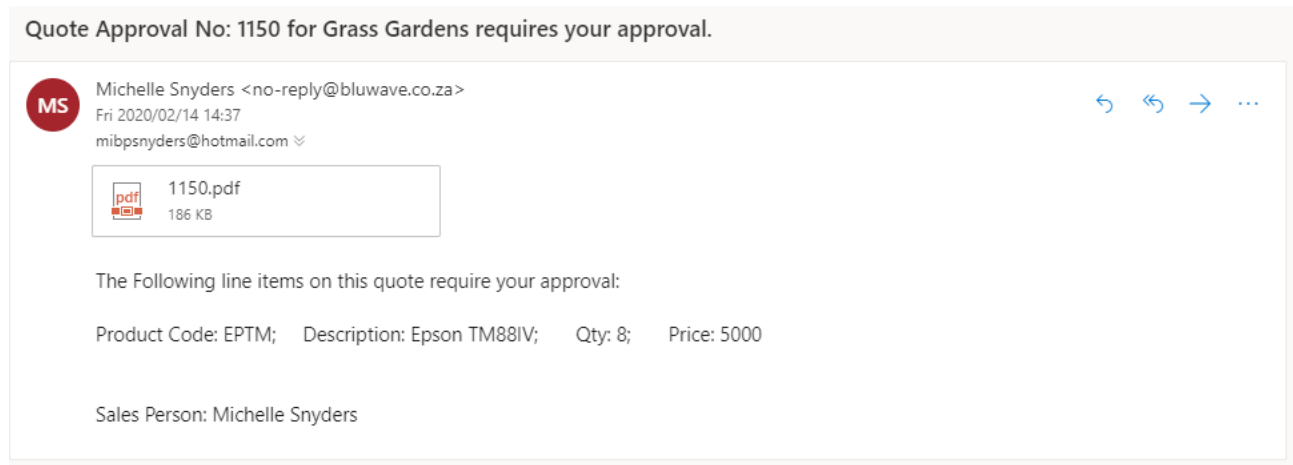
If they are ready to send the quote, they can request approval by clicking on the **Request Approval** button at the top of the Preview page.

After clicking on the **Request Approval** button an email will be sent to the approval manager to let them know there is a quote that needs approval.

Once the Approval Manager has Approved the quote, the User will receive an email and they can then return to this page to email the quote to the client.

9.5.2 What is required from the Approval Manager

Once the user has requested approval the approval manager will receive an email with the quote requiring approval, as an attachment.



The Approval Manager would need to then log into BluWave CRM to approve the quote.

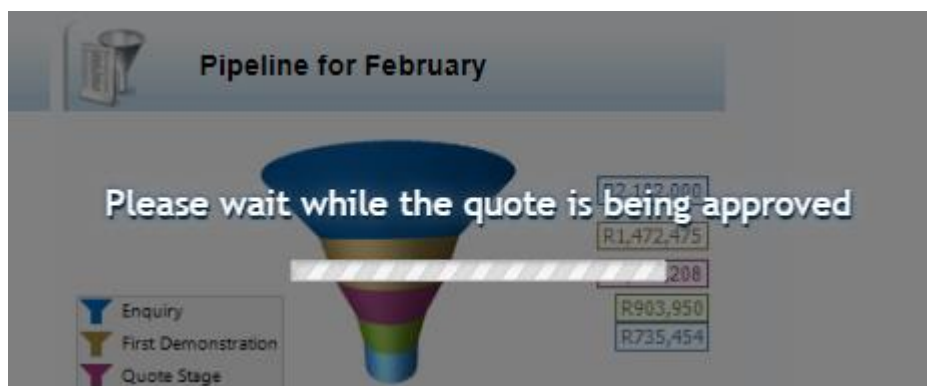
On the Approval Managers' **Home Page**, they would be able to see a list of all the quotes requiring their approval.

The Approval manager would then be able to do the following:

- Click on the **Company** name to go to the **Edit Company** page.
- Click on the **Quote Number** to access/ edit the quote.
- Click on the **Checkbox** to instantly approve the quote.



Once the Approval Manager checks the Approval Checkbox, and email will be sent to the Sales Staff to notify them that the quote has been approved/ declined.



If the Approval Manager wishes to edit the quote or preview the quote before approving, they could access the quote by clicking on the **Quote Number**.

This will direct the Approval Manager to **Step 3** of the Quote process.

From here the Approval Manager can make changes as necessary as well as preview the quote.

The Approval Manager would need to change the selection of the **App. Status** field to approved or to approval declined.

Once the manager has made a selection, an email will be sent to the Sales Staff to notify them of the change in approval status on their quote.

Quote Approval No: 1150-1 for Grass Gardens Inbox x

Michelle Snyders <no-reply@bluwave.co.za>
to me ▾

2:51 PM (0 minutes ago) ☆ ↶ ⋮

Your quote approval has been granted. Note:

↶ Reply

➡ Forward

9.6 Email the Quote

To Email a quote to the client, you would click on the **Email Quote** button at the top of the **Quote Preview** page.

Email Quote

☒ **Create Activities for Emails** Ticking this checkbox saves the Email Sent under the activity history on the Edit Company Page.

To : Gregg@grass.co.za;

Cc :

Bcc :


Attach : Quote.pdf

Subject : Grass Gardens Quote No 1150-1 for 8 Office Printers

Message :

Dear Gregg

Kind Regards,

 Michelle Snyder
Sales Consultant
Cell: 074 586 3506
Tel: 081 766 4422
18 Curzon Rd, Bryanston, Johannesburg

This email will be sent to the recipients as well as the Sales Staff (automatically included to receive a copy of this email.)

The subject line includes: the **Customer Name**; **Quote Number**; and the **Quote Description**.

The Body of the email contains the default message defined in the Quote Set up – the user will be able to edit the message before sending.

Their email signature will also be automatically added if it is setup on their user profiles.

9.7 Auto Creating an Opportunity

When a quote is generated without raising an opportunity first, the system will automatically create an opportunity with a link to the quote.

Clicking on the **Edit Quote** link will open the quote to edit or preview the quote if required.

9.8 Creating a Follow up Activity

When a quote/ opportunity is created, the user can let the system automatically create a follow-up activity for that quote/ opportunity.

A Follow up activity can be created from the Add/ Edit Opportunity page or Step 3 of the quote process.

The user would simply need to make sure to populate the **Next Activity/ Follow up Activity** with the relevant **Follow Up Date** for the activity. (The system could be set to automatically fill in Quote Follow Up on Step 3; as well as to automatically default the date of the next activity to a specific number of days after the creation of the opportunity/quote.)

The activities will be created as soon as the user click on either the **Save and Preview Quote** button (on Step 3 of the Quote process) or on the **Update** button (on the Opportunities page).

9.9 Updating the Opportunity Status from a Follow up Activity (Completing)

Once a Follow up Activity is created, it will be linked to the opportunity.

This allows the user to easily update the status of the opportunity, provide the system with the feedback on that activity and complete the follow up activity, all on one page.

A Follow up activity can easily be found by looking at the **To Do List** page.

The screenshot shows the 'To Do List' page with the following data:

Start Date	Task?	Company Name	Contact	Activity	Days	Note
14/02/2020	<input type="checkbox"/>	Captivation	Gary Schultz	Present Proposal	0	Present Solution
14/02/2020	<input checked="" type="checkbox"/>	Green Leaf	Bobby Roots	Telephone Call	0	Follow up Quote/Opp No: 1148 Opp Name - Printers- 6- Office Use
12/02/2020	<input checked="" type="checkbox"/>	Captivation	Gary Schultz	Call for Demo	2	Call to Arrange Demo
12/02/2020	<input checked="" type="checkbox"/>	Ukhas Hospital	Teddie Moore	Arrange Cust Visit	2	Please visit the customer

The **Note** of a Follow up Activity is automatically populated with the details of the related quote/opportunity.

To Edit and/or Complete this Activity, click on the **Activity Description**.

The screenshot shows the 'Edit Activity' page with the following details:

- Appointment Details:**
 - Sales Staff: Michelle Snyders
 - Company: Green Leaf
 - Contact: Bobby Roots - Sales Rep - Influencer
 - Location: 011 474 5664 bobby@greenleaf.co.za
 - Activity: Telephone Call
 - Task?: ☒
 - Start Date: 14/02/2020 00:00
 - End Date: 14/02/2020 00:00
 - Date Created: 13/02/2020 Created By: Michelle Snyders
 - Quote/Status: 1148 : 2020-02-13 : Printers- 6- Office Use
 - Quote Status: Enquiry
 - Note: Enquiry, First Demonstration, Quote Stage, Negotiation, Verbal Order, Sold, Lost, Decided Not to Buy
- Buttons:** Update, Update & New, Cancel, Invite Contact?, Invitees, View Map, Product Usage, Document, Attach.

The user would then be able to type in their notes (feedback) on the activity and change the **Quote Status** of the Opportunity/Quote.

9.10 Closing the Opportunity or Quote

To close an Opportunity/ Quote, the user would need to change the **Status** of the Opportunity to Sold, Lost or Decided Not to Buy on the **Edit Opportunity** page.

Status: **Sold** ▼

Probability %: 10

Value: 183200

GP Value: 61600

Created By: Michelle Snyders

Next Activity: Quote Follow Up ▼

Activity Date: 18/02/2020 ▼

Quote/Opp No: 1150-1

[Edit Quote](#)

Quote Due: ▼

Quote Submitted: 14/02/2020 ▼

Date Sold/Lost: 14/02/2020 ▼

To mark the opportunity as **Sold**, only the date **Sold/ Lost** would need to be populated. (The system will automatically populate this field to the current date, this can be changed if required.)

Status: **Lost** ▼

Probability %: 10

Value: 183200

GP Value: 61600

Created By: Michelle Snyders

Next Activity: Quote Follow Up ▼

Activity Date: 18/02/2020 ▼

Quote/Opp No: 1150-1

[Edit Quote](#)

Quote Due: ▼

Quote Submitted: 14/02/2020 ▼

Date Sold/Lost: 14/02/2020 ▼

Reason Lost: Out of Budget ▼

Competitor: Flash Paper ▼

When marking the opportunity as **Lost** or **Decided Not to Buy**, the user would also need to **provide a reason** why the opportunity was lost (or the client decided not to buy).

The user would also be able to select the **Competitor** they lost the opportunity to, from the dropdown list. (If the Competitor Name is not listed, the system admin would need to add it to the system setup, ensure the name is added to the notes field on the opportunity in the interim.)

Closing the Opportunity/ Quote can also be done from the **Follow up Activity** page, by changing the **Quote Status** field to **Sold**, **Lost** or **Decided Not to Buy**.

9.11 Creating Current Products and Job Cards from the Quote

Once the client has accepted the quote, the user would be able to create **Current Products (Contracts)** as well as **Job Cards** from the Quote Line Items.

This can be done by clicking on the **Process Order** button on Step 3 of the Quote process.

Description	No	Product	Description	Narrative	Qty	Price	Job No	Contract #
1	1.1	Can1	Cannon G4400	This printer is available in the following colours: Pink, Red, Blue.	8	R 3400.00	<input type="checkbox"/>	Create
	1.2	2019PPINKBL	Black Tub - Printing Press		8	R 4000.00	<input type="checkbox"/>	Create
2	2.1	EPTM	Epson TM88IV		8	R 5000.00	<input type="checkbox"/>	Create
	2.2	2019PPINKBL	Black Tub - Printing Press		8	R 4000.00	<input type="checkbox"/>	Create

To Create a Current Product (also known as an Asset or Contract) – The user would only need to click on the **Create** link on the right-hand side of the product. (The user will be directed to the Current Product page- with the relevant details populated)


To Create a Job Card – the user would be able to tick all the line items that was bought (or should be installed) and then click on the **Create Job** button.

For the job card, the following fields at the top of the page would also need to be populated:

- **Job Team:** Which team should the job card be allocated to.
- **Job type:** What Job Type should the Job Card be created as.
- **Customer Order No:** The Order number the customer provided. (Could be a standard order number).
- **Job Date:** The date the Job should be created for.

9.11.1 Current Product Created

Once a Current Product is created, the user will be directed to the page below. The user can enter the outstanding information on this page before clicking on the **Update** button.



Edit Current Product

Current Product Details

** Required Fields*

Sales Staff:	Michelle Snyders ▼ *	Equipment Status:	▼	Own ▼
Company:	Grass Gardens	Agreement Type:	▼	
Contact:	Gregg Ellis Mr ▼ *	Agreement Number:	1150-1	
Quote Ref:	1150-1 <input type="button" value="View Quote"/>	Agreement Start:	▼	End: ▼
Product:	Cannon G4400 * 🔍	<u>Service Details:</u>	Annual Escalation Date:	01/02/2020 ▼
Serial Number:	1150-111 *	Service Call Cycle?:	New Cycle	
Asset Number:		Service Frequency:	0	Months
Purchase Date:	17/02/2020 ▼ Price: 3400	Last Service Date:	▼	Next: ▼
<u>Details:</u>	Reason Expired: ▼			
<div> <p>This printer is available in the following colours: Pink, Red, Blue.</p> </div>		Competitor:	▼	
		Payment Frequency:	0	Months
		Recurring Payment:	0	
		Last Payment Date:	▼	Next: ▼
<div> <p><u>Special Instructions: (For Jobs)</u></p> <p>Special Instructions</p> </div>			▼	
<div> <input type="button" value="Linked Doc:"/> <input type="text"/> <input type="button" value="View File"/> </div>				

Creating Jobs from Equipment/Contract:

Default Job Type:	▼	Team:	▼	Job Date:	17/02/2020 ▼	<input type="button" value="Create Job"/>
Request Order Number for each Job?:	No ▼	If not, use this Standard Order Number:	<input type="text"/>	Expires on:	<input type="text"/>	▼

Last Updated: 17/02/2020 Updated By: Michelle Snyders

- **Equipment Status:** Shows if the Current Products is Active, Inactive, On Hold or Lost (depending on setup entries).
- **Agreement Type:** The type of agreement this Current Product is subject to.
- **Agreement Start and End:** The date the agreement starts and ends.
- **Service Details:** Details of when and how often the current products should be serviced.
- **Payment Details:** Details of how much and how often payments should be made on this current product.
- **User Defined Fields:** the user can fill in extra information expected on the extra fields required by their company.
- **Linked Doc:** an attachment can be associated with this current product. (i.e. the digital copy of the agreement)

This current product can then be viewed/ edited from the **Edit Company** page.

9.11.2 Job Card Created

Once the Job Card is created, the user will be directed to this page. The user can enter the information outstanding before clicking on the **Update** button.

This is covered in Service Training.

Update Job

* = Required Fields

Job No: 1053
 Logged by team: Michelle
 Logged by person: Michelle Snyders
 Company: Grass Gardens
 No of open calls: 1
 Acc No:
 Contact: Gregg Ellis
 Contact details: Gregg@grass.co.za
 Job type: Printer Maintenance
 Cust order no: 123456
 UDF 1:
 Date Logged: 17/02/2020 08:37:11
 Asset Serial #:
 Agreement #:
 Cust Asset #:
 Expiry Date:
 Next Service:
 Product:
 Job Card: Print Print Blank Email

Exp Solution Date: 17/02/2020 00:00
 Invoice No/Date:
 Date/Time Closed:
 Job State: Open Closed
 Linked Quote: 1150-1
 Preview and Email Quote

Job Notes/Actions Job Status Booked Technicians Fault Codes Job Costing

Activity: Collect Printer For Service/Repair
 Note:
 File:
 Attach
 Save Note
 Send Email

This Job Card and its Status can be viewed from the **Edit Company** page.

Contacts	New
Cycles	New
Scheduled Activities	New
Completed Activities	New
Opportunities	New Quote New
Current Products	New
Product Usage	Edit Usage
Jobs	Open

ProdID	Product	Sales Rep	Opp Name	Potential Value	Expected Date	Status	Quote No
Can1	Cannon G4400	Michelle Snyders	8 Office Printers	R183,200.00	29/02/2020	Lost	1150-1

Delete	Purchase Date	ProdID	Product	Serial No	Aggr. No	Sales Rep	Expiry Date	Status	Details
	17/02/2020	Can1	Cannon G4400	1150-111	1150-1	Michelle Snyders			This printer is available in the following colours: Pink, Red, Blue.

10. Practical Activity

Please use the company you have created during the training session

The Activity will cover the following concepts:

- Raising an Opportunity.
- Creating a Quote.
- Completing a Follow up Activity.
- Updating an Opportunity.



It needs to be based on your day to day typical sales experiences.

Read through the whole activity before starting:

Peter has contacted you asking for pricing on some of your products.

In order to record this potential sale in your system you will need to the following:

1. Create an opportunity, ensuring that all the fields are correctly populated.
 - 1.1 Book a follow up telephone call for tomorrow.

You may skip question 2 and 3 if you are NOT quoting from BluWave.

2. Create a quote for Peter with the following criteria:
 - 2 options to choose from.
 - At least 2 products under each offer.
 - Remove offer totals from the first offer.
 - Remove line values from the second offer.
 - Ensure the potential quote value reflects the offer that Peter is most likely to buy.
 - 2.1 Email the quote to Peter.
 - 2.2 Create a quote follow up task for tomorrow.
3. During your follow up call with Peter, he requested a better price on option 2 as he wants to order double the initial quantity you quoted him for. (Remember to re-send the quote to Peter).
4. Complete your follow up activity and record the feedback in the system.
5. After 3 days, Peter sends you an email stating that he has decided not to purchase the products from you as he has managed to source them from another supplier at a cheaper rate. Update and close your opportunity accordingly.

11. Reports- Opportunities & Quotes

11.1 Opportunities Issues Report

Opportunities Issued Report

Branch Description : Johannesburg							
Salesperson : Michelle Snyders							
Product Group : Printers							
Date	Quote No	Company & Contact	Opportunity Name	Product	Status	Potential Value	GP Value
2020-02-05	1142	Training Michelle1 Michelle Snyders (Left)	5 printers- Office guessing 2000 per printer	Cannon G4400	First Demonstration	R38,690.00	R10,090.00
2020-02-14	1152	Vodacom Ms Nicola Potgieter	Commercial Printers	Heidelberg Five Colour Offset Printing Pre	Quote Stage	R90,000.00	R19,000.00
2020-02-14	1150-1	Grass Gardens Mr Gregg Ellis	8 Office Printers	Cannon G4400	Lost	R183,200.00	R61,600.00
2020-02-14	1151	Green Leaf Bobby Roots	8 Office Printers	Cannon G4400	Quote Stage	R3,400.00	R900.00
Total For : Printers					4	R315,290.00	R91,590.00
Product Group : Quoted Products							
Date	Quote No	Company & Contact	Opportunity Name	Product	Status	Potential Value	GP Value
2020-02-05	1143	Green Leaf Bobby Roots	London to Germany sdfghjklkjhgfd	Quoted Products	Enquiry	R20,000.00	R0.00
2020-02-13	1149	Vodacom Ms Nicola Potgieter	5 Commodities; 3 Blended	Quoted Products	Negotiation	R900,000.00	R0.00
2020-02-13	1148	Green Leaf Bobby Roots	Printers- 6- Office Use	Quoted Products	Enquiry	R12,000.00	R6,000.00
Total For : Quoted Products					3	R932,000.00	R6,000.00
Total For : Michelle Snyders					7	R1,247,290.00	R97,590.00
Total For : Johannesburg					7	R1,247,290.00	R97,590.00

11.2 Quotes Issued Report



Quotes Issued Report

Branch Description : Johannesburg							
Salesperson : Michelle Snyders							
Created By	Quote Date	Quote No	Company Name	Potential Value	GP Value	Quote Submitted	Lead Time Days/Hours
Michelle Snyders	2020-02-05	1142	Training Michelle1 5 printers- Office	R38,690.00	R10,090.00	05/02/2020	0 5
	2020-02-05	1143	Green Leaf London to Germany	R20,000.00	R0.00		0 0
Michelle Snyders	2020-02-13	1148	Green Leaf Printers- 6- Office Use	R12,000.00	R6,000.00		0 0
	2020-02-13	1149	Vodacom 5 Commodities; 3 Blended	R900,000.00	R0.00		0 0
Michelle Snyders	2020-02-14	1150-1	Grass Gardens 8 Office Printers	R183,200.00	R61,600.00	14/02/2020	0 0
Michelle Snyders	2020-02-14	1151	Green Leaf 8 Office Printers	R3,400.00	R900.00	14/02/2020	0 3
Michelle Snyders	2020-02-14	1152	Vodacom Commercial Printers	R90,000.00	R19,000.00		0 0
Totals for : Michelle Snyders			7	R1,247,290.00	R97,590.00		
Totals for : Johannesburg			7	R1,247,290.00	R97,590.00		

11.3 Opportunities due by Sales Staff and Status Report

Opportunities Due By Sales Staff, Status Report

For Period 01/02/2020 To 29/02/2020

Exp. Order Date	Company	Quote #	Opp Name / Note	Pot. Sale Value	Prob %	Exp. Value	GP %	GP Value
Branch Description : Johannesburg								
Salesperson : Michelle Snyders								
Status : Enquiry								
29/02/2020	Adams&Adams	1137	5 printers	R1,500,000.00	0	R0.00	0.00%	R0.00
Next Action : None								
29/02/2020	BluWave Software	1132		R650,000.00	0	R0.00	0.54%	R3,500.00
Next Action : Service Call 18/02/2020								
29/02/2020	Green Leaf	1143	London to Germany	R20,000.00	12	R2,400.00	0.00%	R0.00
Next Action : Quote Follow Up 19/02/2020								
29/02/2020	Green Leaf	1148	Printers- 6- Office Use	R12,000.00	20	R2,400.00	50.00%	R6,000.00
Next Action : Quote Follow Up 19/02/2020								
Total Opportunities Due For : Enquiry			4	R2,182,000.00		R4,800.00		R9,500.00
Status : First Demonstration								
29/02/2020	Afrox	1035		R0.00	0	R0.00	0.00%	R0.00
Next Action : None								
29/02/2020	BluWave Software	1073		R1,200,000.00	0	R0.00	0.00%	R0.00
Next Action : Service Call 18/02/2020								
29/02/2020	kitty place	1070		R2,500.00	0	R0.00	0.00%	R4,850.00
Next Action : None								
29/02/2020	MTN	1038		R200,000.00	0	R0.00	0.00%	R0.00
Next Action : None								
29/02/2020	Training Michelle1	1142	5 printers- Office	R38,690.00	80	R30,952.00	26.08%	R10,090.00
Next Action : None								
Total Opportunities Due For : First Demonstration			5	R1,441,190.00		R30,952.00		R14,940.00
Total Opportunities Due For : Michelle Snyders			9	R3,623,190.00		R35,752.00		R24,440.00
Total Opportunities Due For : Johannesburg			9	R3,623,190.00		R35,752.00		R24,440.00

11.4 Opportunities Won and Lost by Rep Report

Opportunities Won and Lost By Salesperson Report

For Period 01/02/2020 To 29/02/2020

Branch Description : Johannesburg							
Salesperson :		Michelle Snyders					
Opportunity State :		Decided not to buy					
Status :		Decided Not to Buy					
Company Name	Product	Quote No	Pot. Value	GP Value	Date	Reason Lost	Competitor
Adams&Adams	Epson TM88IV	1138-2	R32,275.00	R5,276.00	17/02/2020	Out of Budget	
Total For : Decided Not to Buy		1	R32,275.00	R5,276.00			
Total For : Decided not to buy		1	R32,275.00	R5,276.00			
Opportunity State :		Sold					
Status :		Sold					
Company Name	Product	Quote No	Pot. Value	GP Value	Date	Reason Lost	Competitor
Spur Steak Ranches	Quoted Products	1107	R10,500.00	R4,150.00	17/02/2020		
Total For : Sold		1	R10,500.00	R4,150.00			
Total For : Sold		1	R10,500.00	R4,150.00			
Total For : Michelle Snyders		2	R42,775.00	R9,426.00			
Total For : Johannesburg		2	R42,775.00	R9,426.00			

12. Appendix

12.1 A- Quote Example



Quotation

Quote No:	1150-1	Date:	14/02/2020
Acc No:		Valid for:	14 Days
To:	Grass Gardens	Address:	
Att:	Mr Gregg Ellis		
Tel:		From:	Michelle Snyders
Fax:		Tel:	011 462 6871
Cell:		Cell:	074 586 3506
Email:	Gregg@grass.co.za	Email:	mibpsnyders@gmail.com

Dear **Gregg**

Re: **8 Office Printers**

We thank you for the opportunity afforded us to quote you on the Lazer Business Equipment. (Quote Header Paragraph)

Option 1

Description	Qty	Price	Total
Cannon G4400 This printer is available in the following colours: Pink, Red, Blue.	8	3,400.00	27,200.00
			
Black Tub - Printing Press	8	4,000.00	32,000.00

No Offer Total is showing- Settings were selected to exclude this Total.



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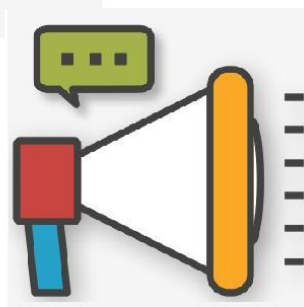
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Quotation

No: 1150-1

Option 2

Description	Qty	Price	Total
Epson TM88IV	8		



Black Tub - Printing Press

8

TOTAL (Ex VAT) :	R 72,000.00
VAT :	R 10,800.00
Total:	R 82,800.00

No Line Price
Totals is
showing-
Settings were
selected to
exclude this
Total.

Option 3

Description	Qty	Price	Total
HP MFP m277dw	8	6,500.00	52,000.00

TOTAL (Ex VAT) :	R 52,000.00
VAT :	R 7,800.00
Total:	R 59,800.00

Option 4

Description	Qty	Price	Total
Cannon G4400	8	3,400.00	27,200.00

This printer is available in the following colours:
Pink,
Red,
Blue.



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Quotation

No: 1150-1

Option 4

Description	Qty	Price	Total
Black Tub - Printing Press	8	4,000.00	32,000.00
GRAND TOTAL (Ex VAT) :			R 242,400.00
VAT :			R 36,360.00
GRAND TOTAL:			R 278,760.00

Deposit

50/50

Cancelling

NO

Currency of the Quote

This quote is done in the following currency: Rand

Rate of Exchange

This quote is done using the following rate of exchange: Rand 1.00 = Rand 1.00

ROE

R 1.00 = Rand 1.00

Should you require any further information, please do not hesitate to contact us on (011) 462 7456 (Quote Footer Paragraph)

Michelle Snyders

Implementation Consultant

074 586 3506

mibpsnyders@gmail.com

The Grand Total will only show if selected to show on Step 3 of the Quote process.



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