



## BluWave crm System Setup Manual

Use the **System Setup** Tab of the system to set up all the user configurable areas of the system.

The following are the areas required to be configured before **BluWave crm** can be used in a live environment. Please research your existing manual or automated systems so as to define all the types of data required to be gathered about customers and prospects.

**All codes need to be unique, codes cannot be changed or deleted. Only the description can be changed.**

A screenshot of the BluWave CRM web application interface. At the top, there is a navigation bar with the BluWave logo and links for "Getting Started", "Change Password?", and "Log Out?". Below this is a main menu with tabs for "Home", "Activities", "Leads", "Contacts", "Companies", "Opportunities", "Reports", "System Setup", "Financials", and "List Manager". The "System Setup" tab is selected and highlighted. Below the main menu, there is a sub-menu with links for "System Setup", "Administer Users", "Edit Profile", "Imports", "Quote Setup", "Pricelist Management", "Documents", "Volume Pricing", and "Workflow". The main content area is titled "System Setup" and contains a "Select Dropdown List to Edit:" section with a list of items: Activities, Agreement Types, Areas, Branches, Competitor Names, Contact Categories, Company Groups, Company Merge, Company States, Countries, Currency, Customer Types, Email Templates, Group Contract Pricing, Industries, Lead Statuses, Opportunity Statuses, Payment Terms, and Price Lists. On the left side of the interface, there are three widgets: a "Search" widget with a search box and a "Within" dropdown; a "Quick Create" widget with a "Please Select..." dropdown; and a "Calendar" widget showing the month of October 2016. At the bottom left, there is a "Last Invoice Date: 26/08/2016" label.

## 1. Branches

Edit branches by selecting the branches option from the list of set up items on the System Setup Tab. Use the branches option to define the branches that your sales team is assigned to in your organisation.

**NB You will need to add these first before adding your users under the Administer Users Menu option under the System Setup Tab.**

## 2. Administer Users

Use this menu option under the System Admin Tab to add names of all sales staff and other users whom will be using *BluWave crm*. Two options are available to specify which users are active or inactive.

The screenshot displays the 'Administer Users' interface in BluWave CRM. The top navigation bar includes 'Home', 'Activities', 'Leads', 'Contacts', 'Companies', 'Opportunities', 'Reports', 'System Setup', 'Financials', and 'List Manager'. The 'System Setup' menu is expanded to show 'Administer Users'. The main content area is titled 'Security Roles' and has a 'New User' button and radio buttons for 'Active' (selected) and 'Inactive'. Below this is a table of users with the following columns: Full Name, Branch, User, Restricted User, Manager, Restricted Manager, Executive, System Admin, Setup, List, GP, Approval, and Active. The table lists 11 users, all from the 'Bryanston' branch, with various permission checkboxes. A sidebar on the left contains a search box, a 'Quick Create' button, and a calendar for October 2016. The 'Last Invoice Date' is shown as 20/08/2016.

	Full Name	Branch	User	Restricted User	Manager	Restricted Manager	Executive	System Admin	Setup	List	GP	Approval	Active
<a href="#">Edit</a>	Angela Van Zyl	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Armand van Jaarsveld	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Byron Cooke-Tonnesen	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Dylan Cooke-Tonnesen	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Elizna Murphy	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Lindsey Fenthum	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Nkuli Molo	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Stuart Lowe	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Tania Cooke-Tonnesen	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Tarryn Buss	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Security Roles

Define the security roles of each User.

Should they have access to all customers and prospects or only their own clients or the Branch's clients?

(See [Security Model at the end of this document](#))

Should they have access to change the system set-up of the system?

## 3. Customer & Prospect Types

These are used to categorise your prospects and customers. Customers can be "typed" by their value or potential value.

#### **4. Sources**

Develop a list of all sources of prospects. Specify each advertisement or media; cold calling; referrals - from customers, personal, from prospects; exhibitions, direct mail promotions (specify only those currently in use).

#### **5. Industry Sector**

Use this field to specify the industry sector that the prospect or customer company operates in. Try to keep the industry sectors to as few as possible to make it easier for you to target your direct marketing. If there are too many industries it makes it difficult to generate mailing lists.

#### **6. Area**

This field is used to indicate the geographical location the prospect or customer is in. This is useful for the user for planning his call cycles if regular visits to customers are required. Define suitable areas and describe to the sales team what these are. Areas should then be allocated to a "Route" for cyclical calling.

#### **7. Routes**

Create Routes that group the areas above into broader geographical regions. E.g. Areas like Randburg, Sandton, and Fourways can all be grouped into the route JHB North. This will assist the sales people in managing their territories. This is also required for cyclical calling.

#### **8. User-Defined Fields Client Data Items**


There are 6 additional fields you can add to the client details. These are called "User-defined Fields". You can assign a name to each field under system set up and these names will then display on the companies form on the right-hand side. Each of the fields are of different data types: 2 numeric, one date and 3 alphanumeric with drop down selections. The 3 Drop downs can also be populated from system set up.

#### **9. Contact Categories**

This field is your first/primary contact profiling field. Think about how you need to classify your contact people and decide if you need to categorise your customer and prospect contact people for a particular purpose. For example, you can use the terminology described in your sales process for prospects e.g. Sponsor, gatekeeper, decision-maker etc. For customers you may prefer to categorise people by function e.g. sales, marketing, production, finance, or by level of management e.g. senior, middle, operational or both: senior - sales, middle financial etc. You may wish to indicate whom is a user of your product and flag them with these functions.

## 10. Opportunity Statuses (Sales Path)

Develop a list of the steps that an opportunity moves through from first contact through to completed sale. Note that each status has to be categorised as either A – Active, S – Sold, X – Lost to Competition or Y – Decided Not to Buy. These states are used by the system to indicate if the opportunity is active, lost, sold. A typical set of opportunity statuses could be as follows:



### System Setup

Select Dropdown List to Edit:

	Seq.#	Code	Description	State
<a href="#">Edit</a> <a href="#">Delete</a>	25	TS	Referred Telesales	A
<a href="#">Edit</a> <a href="#">Delete</a>	30	L	Lead Stage	A
<a href="#">Edit</a> <a href="#">Delete</a>	35	E	Qualified Prospect	A
<a href="#">Edit</a> <a href="#">Delete</a>	40	D	Arranged Demo	A
<a href="#">Edit</a> <a href="#">Delete</a>	45	C	Demonstrated	A
<a href="#">Edit</a> <a href="#">Delete</a>	50	B	Proposal Submitted	A
<a href="#">Edit</a> <a href="#">Delete</a>	52	CE	Currently Evaluating	A
<a href="#">Edit</a> <a href="#">Delete</a>	55	AB	Awaiting Budget	A

1 2

### Add a new Opportunity Status

Status Code:  Status Description:   
State:  Sequence No:

## 11. Leads Statuses

Applies to Leads only. Leads can be imported from a marketing database list or from your web enquiries. Develop below a list of the steps that a typical lead moves through from first contact through to qualified prospect stage.

## 12. Customer States

The state field is also used for customers to indicate their current status e.g. New Customer, Valued Customer, Recommender, Archived/Inactive Customer, Account on Hold etc. Prospects have a different list of “states” – so you could have active prospects, inactive prospects etc.

## **13. Activities**

Define all the activities sales and support staff performs in order to secure a sale and service customers for e.g.: "Follow up on proposal" or "Fax brochure". These should correspond to the sales path. For example, if one of the statuses is "Demonstration", then one of your activities would be "Demonstration". The activities should be as descriptive as possible and should relate to the sales process as described in the Sales Path. If you use descriptive activities it helps everyone to know exactly what is scheduled or was done at a customer.

### **Activity Code & Description**

Each Activity has a 3 character code as well as a 20 character description. The activity description is used by the user in the system but the activity code is stored by the system so once the code is in use it should not be changed or it will affect the activity history. The activity description however can be changed if required. For Example you may wish to change a description called First Demo to First Consultation because it better suits your sales process. This would mean that the activity history would show as First consultation assuming you keep the code the same and just change the description.

## **14. Reasons Lost**

If a sale is lost to a competitor, the system will ask for a reason lost. Enter a list of the common reasons e.g. product features, delivery period, price too high etc. In addition, the system will also ask whom it was lost to – see competitor list below.

## **15. Competitor Names**

For lost sales, the system will also ask whom it was lost to; enter here a list of the options.

## **16. Products**

Products are used for opportunities and also by the Quotes Automation function. Products either need to be imported into the Products Table or alternatively load the products individually. The fields that are required are the Product ID, Product Description, Product Group, Add a Narrative and Selling Price.

### **16 a. Product Groups**

Group the products uploaded here. Each product group can have multiple products under it. These groups can either be imported or entered manually.

## 17. Document Management

Create folders and Subfolders on the BluWave document management area to allow for uploading marketing materials and Quotes created from out of the system. These documents can then be attached to emails. Refer to attached documentation on how to set this up

Add new users to *BluWave* crm as follows:

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

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

The screenshot shows the BluWave CRM interface. The top navigation bar includes tabs for Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, Financials, and List Manager. Below this, a secondary navigation bar contains links for System Setup, Administer Users, Edit Profile, Imports, Quote Setup, Pricelist Management, Documents, Volume Pricing, and Workflow. The main content area is titled 'Security Roles' and features a 'New User' button and radio buttons for 'Active' and 'Inactive'. A table lists existing users with their details and permissions.

	Full Name	Branch	User	Restricted User	Manager	Restricted Manager	Executive	System Admin	Setup	List	GP	Approval	Active
Edit	Angela Van Zyl	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Armand van Jaarsveld	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Byron Cooke-Tonnesen	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Dylan Cooke-Tonnesen	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Elizna Murphy	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Lindsey Fenthum	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Nkuli Moloi	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Stuart Lowe	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Tania Cooke-Tonnesen	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Tarryn Buss	Bryanston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

**Search**

Search

Within **Please Select...**

**Quick Create**

**Please Select...**

**Calendar**

October 2016

Mo	Tu	We	Th	Fr	Sa	Su
26	27	28	29	30	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

Last Invoice Date: 29/08/2016

### New User Details and Roles

Full Name  Monthly Target

Branch  Date Captured

Designation  Active?

Telephone  Rep Code

Cell

Email  This Email address will be used as the User Login Name.

Do all Quotes from this user Require Approval?

**Roles**  User  Manager  Executive  System Admin  Setup  List  GP  Approval

Restricted User  Restricted Manager

Save User Details

Save & New

Cancel

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

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



## Edit My Profile/Change Password

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

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

### Edit User Details and Roles

<p>Full Name <input type="text" value="Administrator"/></p> <p>Branch <input type="text" value="Bryanston"/></p> <p>Designation <input type="text" value="Sales Manager"/></p> <p>Telephone <input type="text"/></p> <p>Cell <input type="text"/></p> <p>Email <input type="text"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #008000; color: white;"> <th style="text-align: left;">Monthly Targets</th> <th style="text-align: left;">No of Quotes</th> <th style="text-align: left;">0</th> </tr> </thead> <tbody> <tr> <td>Target Quoted Value</td> <td>0</td> <td></td> </tr> <tr> <td>Target Sales Value</td> <td>80000</td> <td></td> </tr> <tr> <td>GP Value</td> <td>0</td> <td></td> </tr> <tr> <td>No of Units</td> <td>0</td> <td></td> </tr> <tr> <td>No of Face-to-Face Visits</td> <td>0</td> <td></td> </tr> </tbody> </table> <p>Approval Manager <input type="text"/></p>	Monthly Targets	No of Quotes	0	Target Quoted Value	0		Target Sales Value	80000		GP Value	0		No of Units	0		No of Face-to-Face Visits	0		<p>User Name <input type="text"/></p> <p>Date Captured <input type="text" value="23/02/2012 00:00:00"/></p> <p style="text-align: center;"> <input type="button" value="Change Password"/> <input type="button" value="HTML Signature"/> </p> <p style="text-align: center; font-size: small;">To Change your Password, first click on the Change Password button.</p> <p> <input type="checkbox"/> Active  <input type="checkbox"/> Rep Code         </p> <p>TANIA</p> <p> <input type="checkbox"/> Do you want to copy your active opportunities to the current month?  <input type="checkbox"/> Do all Quotes from this user Require Approval?  <input type="checkbox"/> Track Geo Location of Activities?  <input type="checkbox"/> Default New Activity Company to the nearest Company based on Geo location?  <input type="checkbox"/> Do you want BluWaveCRM to book appointments into your email calendar?            Please choose which email client/calendar you are using?  <input type="radio"/> POP3 (<a href="#">iCal</a>) <input checked="" type="radio"/> Gmail <input type="radio"/> Exchange/Outlook 365         </p> <p><b>Email SMTP Settings :</b> (The SMTP settings are used when sending emails from BluWave CRM) <input type="button" value="Test SMTP Settings"/></p> <p>SMTP <input type="text" value="0"/> User Name <input type="text" value="0"/></p> <p>Secure Connection (SSL) <input type="checkbox"/> Password <input type="text" value="•"/></p>
Monthly Targets	No of Quotes	0																	
Target Quoted Value	0																		
Target Sales Value	80000																		
GP Value	0																		
No of Units	0																		
No of Face-to-Face Visits	0																		

Uncheck this tick box and update details for users who have left the company

**Roles**  User  Manager  Executive  System Admin  Setup  List  GP  Approval

Restricted User  Restricted Manager

Various Monthly Targets that indicates the monthly revenue target set for the sales representative is used to measure the following:

- Number of quotes – Indicates the number of quotes the sales representative needs to issue for the month.
- Target Quoted Value – Indicates the value to be quoted for the month.
- Target Sales Value – Indicates the value of sales to be made for the month.
- GP Value – Indicates the gross profit value that needs to be achieved for the month.



- Number of Units – Indicates the number of units that needs to be sold for the month.
- Number of Face-to-Face Visits – Indicates the number of face-to-face appointments the sales representative need to complete during the month.

There is an additional option that will request approval for all quotes a user creates.

#### Geo Location:

The following options can be activated on a per user bases:

- Track Geo location activities – will provide location of completed activities.
- Default new activity company to the nearest company based on Geo location.

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

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

Only a System Administrator can change the following:

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

## 18. Configuring The Quote Setup Area

To configure the BluWave quoting feature, navigate to the Quote Setup area under the System Setup TAB.

**Quotes Setup**



Template: Development

Starting Quote No	<input type="text" value="2670"/>	Validity In Days	<input type="text" value="30"/>	TAX %	<input type="text" value="14"/>	TAX Label	<input type="text" value="VAT"/>
Default Quote Status	<span style="border: 1px solid #ccc; padding: 2px;">Proposal Submitte</span>	Default Quote Activity	<span style="border: 1px solid #ccc; padding: 2px;">Quote Follow Up</span>	Template Sales Manager	<span style="border: 1px solid #ccc; padding: 2px;">Tania Cooke-Torr</span>		
Quote Input Format	<span style="border: 1px solid #ccc; padding: 2px;">Quote Format 1</span>	Quote Output Format	<span style="border: 1px solid #ccc; padding: 2px;">Quote Format 1</span>	Default Quote Follow-up Days	<input type="text" value="2"/>		

Quote Header Paragraph

We have pleasure in submitting our quotation as follows.


Quote Footer Paragraph

If you have any queries, please don't hesitate to contact us.

TOTAL Line Text

Total:

Header Logo:  
(Selected Image must be a JPG - less than 100KB in size. Dimensions: 7 Across x 1 Down.  
Format 2 Ratio: 3 Across x 1 down.)



[Edit](#)

Discount/Rebate Section?	<input type="checkbox"/>	Include Product ID?	<input checked="" type="checkbox"/>	Show Discount?	<input checked="" type="checkbox"/>	Quote Approvals?	<input checked="" type="checkbox"/>
Quote Items Search?	<input checked="" type="checkbox"/>	Quote Offers Totalled?	<input type="checkbox"/>	Generate Opportunity Numbers?	<input type="checkbox"/>	Display Row Shading?	<input checked="" type="checkbox"/>
Force Cost Price Entry?	<input type="checkbox"/>	Insert Product Picture Within Quote?	<input type="checkbox"/>	Default Opp Product to 'Quoted Products'?	<input type="checkbox"/>	Include Product Desc?	<input checked="" type="checkbox"/>
Product Prices Include VAT	<input type="checkbox"/>	Edit Quote Cost Price?	<input checked="" type="checkbox"/>	Exclude header shading on quote?	<input type="checkbox"/>		
Enter own Opp No on Opportunities	<input type="checkbox"/>						

**Mandatory Fields :**

Payment Terms?	<input type="checkbox"/>	Quote Template?	<input checked="" type="checkbox"/>	Delivery?	<input type="checkbox"/>
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**Targets:**

Monthly Unit Sales:	<input type="text" value="8"/>	Quotes to issue per Month:	<input type="text" value="20"/>
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Discount Line 1

Discount

Discount Line 2

Total after discount


Footer Option

Show text on footer     Show image on footer

Page Footer Text

Insert custom page footer

Footer Logo: (The selected Logo Image must be a JPG of less than 100KB in size. Dimensions: 7 across x 1 down.)



[Edit](#)

<input type="button" value="Std Quote Terms"/>	<input type="button" value="Optional Quote Terms"/>	<input type="button" value="Rates of Exchange"/>	<input type="button" value="BCC Recipients"/>
<input type="button" value="Multiple Quote Terms"/>	<input type="button" value="Email Text"/>	<input type="button" value="Option Defaults"/>	
<input type="button" value="Subject Lines"/>			

**Starting number:** indicates what number the first quote generated from the system will be given. Subsequent quotes numbers will be incremented automatically.

**Validity:** Define how long the quote is valid for here. This will show on the quote header as a default but can be changed on each quotation.

**Default Quote Status & Default Quote Activity:** Depending on your sales path, define the activity that is created when quotes are generated. The Default Quote activity will allow you to define the activity that needs to happen after the quote has been sent to the client E.G. Quote follow up

**Template Sales Manager:** Only used on custom quotes.

**Quote Format: Format 1: Input** – Requires a selling price and has a factor or discount.

**Format 1: Output** – One page quote. Will display pictures next to each product if attached.

**Format 2: Input** – Requires cost price and has a gross profit % for mark up.

**Format 2: Output** – Will include a cover letter. Takes the picture of the first product and places it in the top half of the page.

**Format 3: Input and Output** needs to be used together as both have to do with annuity.

**Default Quote Follow-up Days:** Indicates how many days after a quote is sent that the rep must follow up with the client.

**Quote Header Paragraph/ Quote Footer Paragraph:** Use this text fields to enter text that will appear on top and bottom of your quote. A good example is shown in the image above.

**Header Logo:** Upload your company logo here. Click on the Edit link to locate your logo (must be a JPG file less than 100kb) and upload it.

Indicate whether you would like the **Discount/ Rebate section (Custom Quotes)**; and **Product ID** to appear on the quote output.

**Quote Approvals:** If the selling price is altered on the quote, it will have to be approved before the sales staff can send it to the client. Approval manager is set on each individual's profile.

**Quote Items Search:** When compiling a quote the user can search by product code or description.

**Quote Offers Totalled:** A total for all offers will be displayed at the bottom of the quote.

**Generate Opportunity Numbers:** This will be generated when a quote is not done in our system, and will allow manual input of values into the pipeline.

**Display Row Shading:** Alternative lines in the quote will be light grey.

**Force Cost Price Entry:** Use this option on the quote if the cost price must be included in the quote input. It will not display on the quote output.

**Insert Product Picture Within Quote:** Pictures can be uploaded to the system, and displayed on the quote.

**Default Opportunity Product to Quoted Products:** The products displayed on the opportunities/reports will be "quoted products".

**Include Product Description:** Will determine if the product description will be displayed on the quote or not.

**Product Prices include VAT:** The VAT will be included in the list price.

**Edit Quote Cost Price:** Allows the cost price to be edited after a quote is sent.

**Exclude Header Shading on Quote:** This gives the option to display, or not to display shading in the quote header.

**Enter Own Opportunity Number on Opportunities:** Only used on custom quotes.

**Targets:** Set the monthly unit sales target and quotes to issue per month target.

**Discount line 1 & 2:** Indicates what text will be displayed to show the discount per item quoted as well as the total discount on the quote. These two lines will only appear if the Product discount section is turned on.

**Page Footer Text or Logo:** at the bottom of the quote page you can insert some text – e.g. your Directors names. If you have some product logos that display in the footer then you can upload an image that would be displayed in the page footer instead of the footer text.

By default, the page footer always shows the current date and the page number.

**Email Text:** Enter the email text will be used when sending out the quote from BluWave CRM  
The key word {Contact} must be used for the system to pick up the contact's name.

**Standard Terms:** Set up the standard terms and conditions used in your quotes here. These will appear in all generated quotes.

**Optional Quote Terms:** Set up the optional terms and conditions used in your quotes here. This can then be selected as you create quotes.

**Multiple Quote Terms:** Allows you to set standard terms and conditions for various scenarios.

**Rate of Exchange:** Enter a list of the various rates of exchanges here to be selected when creating quotes should you be quoting on products that may be affected by fluctuations of other currencies.

**BCC Recipients:** Allows you to add specific people who will be always Bcc'd on all sent quotes by a particular sales rep.

**Key Words for terms & conditions:** Each term can only have ONE keyword. For additional keyword, add in additional terms.

**{Delivery}** - Delivery terms, e.g. 2 weeks ex stock.

**{ROE}** - Rate of Exchange that can be quoted in the terms. E.g. R13=\$1. If the quote is in Rands.

**{QuotedROE}** - The ROE this quote is quoted in if not in Rands.

**{PaymentTerm}** - Terms of Payment. E.g. 30 Days.

**{Currency}** - The Current the quote is created in e.g. Dollars.

## 19. Security in *BluWave crm*

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

- Users
- Manager
- Executive
- System Admin
- Setup
- List
- Approval

## **Users Level Security**

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

## **Managers Level Security**

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

## **Executive Level Security**

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

## **System Admin Level Security**

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

## **Setup Level Security**

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

## **List Management**

List management gives the user access to the list management view of the system that allows the user to download companies, contacts, opportunities and activity history in excel. This access level should only be given to selected users who may want to get mailing lists of the system. The user also has to have executive rights before getting list management rights.

## **Approval**

The login with approval rights will be able to release quotes from the sales people if the approval feature is activated in quote setup. When a sales person changes the indicated prices when quoting, they will not be able to send out the quote till the approval manager has signed off the quotes.

## Security Group

Functions	Users	Managers	Executive	System Admin	Setup
Access own clients	✓	✓	✓	✓	✓
Access other user Schedules in the same branch		✓	✓	✓	✓
Edit other users Activities in the same branch		✓	✓	✓	✓
Access Branch Clients		✓	✓	✓	✓
Access All Clients			✓	✓	✓
Can Edit Accessed Clients	✓	✓	✓	✓	✓
Delete Clients				✓	✓
Delete Opportunities				✓	✓
Reassign Leads and Opportunities		✓	✓	✓	✓
Modify Drop Down lists					✓
Change Sales Staff on Client Details				✓	✓