



## ***BluWave* crm**

### **Recurring Activities and Route Planning User Manual**

# Recurring Activities and Route Planning

The new **BluWave Crm** Cycle Planner feature now allows all BluWave CRM users to create recurring activities for e.g. cyclical telephone calls and visits for customers and prospects. In addition, the cycles can be planned using routes and areas so as to minimise the sales person's travel time across his territory.

The new feature has some in-built flexibility that designed to assist the sales person when he plans his calls for next week, allowing him the flexibility to move calls around to minimise his travel time. If the sales person is required to make appointments with customers, the system speeds up that process as the activities are already in the system he simply needs to enter the arranged time and the system will send the related appointment invite to the customer and then also book in the sales person's calendar.

Cycle Planner now allows all BluWave CRM users to create recurring activities for e.g. cyclical telephone calls and visits for customers and prospects. For instance, a sales person may want to call cycle that reminds them to visit or call on a specific customer every first Monday of the month or every Wednesday fortnightly. Once you have setup these cycles, the CRM will automatically create these activities for you in the frequencies that you have chosen.

Any sales rep with "user" access can only create cycles for their customers but managers can create cycles for all clients falling in their branch while "Executive" access allows one to create cycles for clients across the branches.

## How to Setup BluWave CRM for Cyclical Planning

To setup recurring activities, we recommend that you follow the below steps:

- Define areas and routes.
- Assign clients to specific areas, routes and type.
- Plan your cyclical calls and visits on paper
- Enter the cyclical activities

### 1. Define Areas and Routes

Before using this new feature, all areas entered on the system need to be on specific route. E.g. All areas in Randburg, Bryanston, Sandton etc can form part of the JHB North Route. The system uses these routes to allow you to plan and see cycles for all customers falling in the same geographical region.

Should you not want to create routes, you assign all your areas to one route.

NB: You cannot assign a recurring activity to a client who has not been assigned to an "Area" and the area must be in turn assigned to a "Route".

To assign your areas to routes, click on System setup and select “Areas” as shown below. Edit the Areas listed and assign them to the respective route then update.

**System Setup**

Select Dropdown List to Edit:

	Code	Description	Route
<a href="#">Update</a> <a href="#">Cancel</a>	<input type="text" value="AT"/>	<input type="text" value="Aeroton"/>	<input type="text" value="JHB East Rand"/>
<a href="#">Edit</a> <a href="#">Delete</a>	ALB	Alberton	JHB East Rand

To add in new routes, use the system setup again and from the drop down list select “Routes”

**System Setup**

Select Dropdown List to Edit:

	Code	Description
<a href="#">Edit</a> <a href="#">Delete</a>	1	JHB Northern Suburbs
<a href="#">Edit</a> <a href="#">Delete</a>	10	PTA North
<a href="#">Edit</a> <a href="#">Delete</a>	2	JHB East Rand
<a href="#">Edit</a> <a href="#">Delete</a>	3	JHB South & Central
<a href="#">Edit</a> <a href="#">Delete</a>	4	JHB West Rand, Krugersdorp
<a href="#">Edit</a> <a href="#">Delete</a>	5	Other Countries
<a href="#">Edit</a> <a href="#">Delete</a>	7	PTA Far East
<a href="#">Edit</a> <a href="#">Delete</a>	8	PTA Centurion
	12	

**Add a new Route**

Route Code:       Route Description:

## 2. Assign Areas and Types to Your Customers

Your customers should all be assigned to an “Area” – at least all the customers you wish to assign a recurring activity. In addition, you should also assign a “Type” E.g. type A, B or C to each customer on the “Edit Companies” screen. This will enable you view cyclical activities for specific types of clients in a given area.

### 3. Plan the Cyclical Calls and Visits on Paper

To ensure that all clients in a calling plan are covered, it is best to segment the clients into different types and assign different call cycles respectively on paper before entering this onto the system.

A typical calling plan would entail calculating the normal working hours in a year for a sales rep that excludes weekends, leave days, public holidays etc. One would then classify which clients need to be seen or called on in a given time period and in which frequency bearing in mind the geographical location of the clients.

Once this plan been devised on paper, then the sales rep can set the recurring activities in the CRM.

### 4. Setting up Cycles for Customers

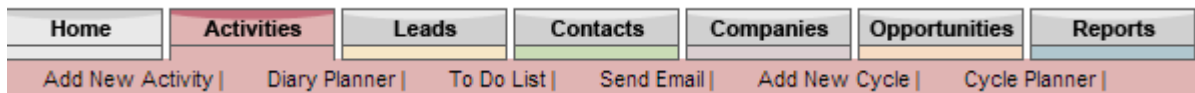
Create cyclical activities via:

- Quick Create
- Activity Tab
- Company Screen- New Cycle Panel

## Quick Create



## Activity Menu



## Company Screen – Cycle Panel

Contacts	▼	<a href="#">New</a>
Cycles	▼	<a href="#">New</a>
Scheduled Activities	▼	<a href="#">New</a>
Completed Activities	▼	<a href="#">New</a>
Opportunities		<a href="#">New Quote</a> ▼ <a href="#">New</a>

**TIP:** When working from the Clients page, the details of the client you wish to create the recurring activity will default but should you use the latter option, you will have to search for the client.

Clicking on the “New Cycle” will open up the following form:

**Add Cycle** [Save] [Save & New] [Cancel]

Service Cycles

Sales Staff: Samuel Kimathi

Company: Samuel Testing Co \*

Contact: Francois Fouche Mr - Manager \*

Activity: Cyclical Visit \*

Start Date: 16/10/2012 \*

Recurrence:

- Daily
- Weekly
- Every 1 day(s)
- Monthly
- Every weekday
- Yearly

Recurrence End:

- No end date
- End after: 1 occurrences
- End by: 16/10/2012

[Save] [Save & New] [Cancel]

### Step 1 – Select Sales Staff

Select the sales staff you want to create the cyclical activity for. Users can only create recurring activities for themselves and for companies allocated to them but users with “Manager” and “Executive” rights can create cyclical activities for sales people in their branch and all branches in the company respectively.

Managers and executive rights users are also able to create these recurring activities for other sales people in the company.

### Step 2 – Select Company and Respective Contact Person

Select the company you are creating the cycle for and select the relevant contact person from the drop down list.

### Step 3 – Select the Recurring Activity

Select the activity you want to recur from the activity drop down menu e.g. cyclical visit, telephone call, service visit etc.

### Step 4 – Select Start Date and Set the Recurrence

Select the date that the recurring activities should begin. The recurrence indicates how the selected activities will be spread out periodically. You can select daily, weekly, monthly or yearly recurrences.

## Examples

### Daily

**Recurrence:**

Daily  
 Weekly  Every  day(s)  
 Monthly  Every weekday  
 Yearly

This will create the activity selected every 2 days of the week recurrently.

### Weekly

**Recurrence:**

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 also select the weekly recurrence.

### Monthly

**Recurrence:**

Daily  
 Weekly  
 Monthly  
 Yearly

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

For monthly cycles, indicate which date of the month you want so set the recurring activity for.

### Yearly

**Recurrence:**

Daily  
 Weekly  
 Monthly  
 Yearly

Every    
 The   of

For yearly cycles, indicate the date and month the selected activity will recur every year.

## Step 5 – Set the Recurrence End

Set when you want the recurring activities to end. You can either set the activities to never end, set it to end after so many recurrences or set the specific date you want the activities to end as shown below then click save.

**Recurrence End:**

No end date  
 End after:  occurrences  
 End by:

## 5. Planning Cyclical Calling By Route “The Cycle Planner”

Navigate to the Cycle Planner under the Activity menu to view all clients with cyclical activities by route for each sale person. Scroll through your plan week by week to see if all the calls are aligned by route and adjust if necessary so as to minimise the sales person’s travel time across his territory. .

The feature has some in-built flexibility that designed to assist the sales person when he plans his calls for next week, allowing him the flexibility to move calls around (do this from the Diary Planner). If the sales person is required to make appointments with customers, the system speeds up that process as the activities are already in the system he simply needs to enter the arranged time and the system will send the related appointment invite to the customer and then also book in the sales person’s calendar.

	22 October 2012 - 29 October 2012						
	22 Mon	23 Tue	24 Wed	25 Thu	26 Fri	27 Sat	28 Sun
J&B East Rand: Aeroton	Sen Cycle Testing (Customer Service Call)		Sen Cycle Testing (Cyclical Tel Call)			Sen Cycle Testing (Cyclical Tel Call)	
J&B Northern Suburbs: Bryanston					3D Impressions (Cyclical YW)		
J&B Northern Suburbs: Centurion			ABB LOW VOLTAGE PRODUCTS (Cyclical YW)		ABB LOW VOLTAGE PRODUCTS (Cyclical YW)		
J&B Northern Suburbs: Honeydew	ABC VENTILATION SYSTEMS (Cyclical Tel Call)		ABC VENTILATION SYSTEMS (Cyclical Tel Call)		ABC VENTILATION SYSTEMS (Cyclical Tel Call)		ABC VENTILATION SYSTEMS (Cyclical Tel Call)
J&B Northern Suburbs: Kyalami							

**Cycle Planner displays recurring activity sorted by Route & Area**



Right click on a particular cycle on the cycle planner in order to adjust the recurrence pattern.

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


Branch : Bryanston Sales Staff : Tania Cooke-Tonnesen

< Today >

23 – 29 October 2012 Timeline

	23 October 2012 - 29 October 2012						29 October 2012
	23 Tue	24 Wed	25 Thu	26 Fri	27 Sat	28 Sun	29 Mon
JHB East Rand: Aeroton		Sam Cycle Testing (Cyclical Tel Call)			Sam Cycle Testing (Cyclical Tel Call)		Sam Cycle Testing (Customer ServiceCall)
JHB Northern Suburbs: Bryanston				3D International (Cyclical Visit)			3D International (Cyclical Visit) Austen Security (Cyclical Tel Call)

You can also search for clients (prospects and customers) that have activity cycles by route, area and type from using the “View Cycles” menu under the Companies menu.

 **View Cycles**

Branch : Bryanston Sales Staff : Samuel Kimathi  Customer  Prospect

Route : JHB East Rand Area : Aeroton Type : A Type


Client : \*

Company Name	Route	Area	Type	Cycle?
<a href="#">Edit</a> Samuel Testing Co	JHB East Rand	Aeroton	A Type	<input checked="" type="checkbox"/>

## 6. Viewing & Editing Activity Cycles from the Companies Tab

The Cycles Panel on the Companies page will list all cycles that exist for a customer and also will show the next occurrence as well as the last occurrence IF IT IS OVERDUE.



You can click on the “overdue date” if there is one or the “next date” in order to edit or complete that activity. You can click on the blue circle symbol to edit the recurrence pattern. You can also delete a cycle from here.

Contacts <span style="float:right">▼ <a href="#">New</a></span>							
Cycles <span style="float:right">▲ <a href="#">New</a></span>							
	<a href="#">Edit</a>	<b>Overdue</b>	<b>Next Date</b>	<b>Activity</b>	<b>Sales Rep</b>	<b>Contact</b>	<b>Note</b>
<a href="#">Delete</a>			02/11/2012	Customer ServiceCall	Samuel Kimathi	Mr Francois Fouche	Customer ServiceCall
Scheduled Activities <span style="float:right">▼ <a href="#">New</a></span>							
Completed Activities <span style="float:right">▼ <a href="#">New</a></span>							
Opportunities <span style="float:right"><a href="#">New Quote</a> ▼ <a href="#">New</a></span>							

## 7. Editing Activity Cycle Recurrence Pattern

At any given time, a user will be able to edit the recurrence of the activities or end the recurring activities all together.

This can be done from the Cycle Planner – Right click on the respective activity and “Edit Recurrence” as shown below.

JHB East Rand: Aeroton				 123Trio1 (Arrange Cust Visit)	 Samuel Testing <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Edit Recurrence</div>		
---------------------------	--	--	--	--	---	--	--

Recurring activities can also be edited from the cycle’s panel on the company’s page or from the “View Cycles” page.

Editing the recurrence will open the following form that will allow you to change how often the activity recurs.

**Service Cycles**

Company: **Samuel Testing Co**

Sales Staff:

Contact:  \*

Activity:  \*

Start Date:  \* Next Call Date: **02/11/2012**

**Recurrence:**

Daily    Recur every  week(s) on:  
 Weekly     Mon  Tue  Wed  Thu  
 Monthly     Fri  Sat  Sun  
 Yearly

**Recurrence End:**

No end date  
 End after:  occurrences  
 End by:

Click on “Update” once done to save the changes.

## 8. Booking Appointments from the Activity Cycles

For cyclical visits to clients, a sales person may want to call their clients and book an appointment. Since the CRM will have already created the recurring activity as a task, the user would have to convert the task to an appointment and enter the time of the appointment or even change the date should this be necessary.

## 9. Completing Cyclical Activities

Recurring activities can be completed from the following pages:

- The Client screen – Cycles Panel
- The To Do list
- Diary Planner

### The Client Screen

From the client screen, expand the cycles tab as shown below.

Click on the date and this will open up the activity for editing or completing.

Contacts								<a href="#">New</a>
Cycles								<a href="#">New</a>
	Edit	Overdue	Next Date	Activity	Sales Rep	Contact	Note	
Delete		05/11/2012	12/11/2012	Customer ServiceCall	Samuel Kimathi	Mr Francois Fouche	Customer ServiceCall	
Scheduled Activities								<a href="#">New</a>
Completed Activities								<a href="#">New</a>
Opportunities								<a href="#">New Quote</a>

The overdue date shows any previous recurring activity that was not completed.

### The To List

Use the “Cycles” radio button to view cyclical activities scheduled for your clients.


To Do List  Activities  Cycles

Show Cycles for  From  Up to and including

	Edit	Overdue	Next Date	Company	Contact	Activity	Type	Route	Area
Delete		06/11/2012	13/11/2012	123Trio5	Denzil Govender	Admin Procedures	B Type	JHB South & Central	Braamfontein
Delete		05/11/2012	12/11/2012	Sam test 2	Mr William Delpport	1st SW Review			
Delete		05/11/2012	12/11/2012	Sam test 2	Mr William Delpport	Approach to Go Live			
Delete		05/11/2012	12/11/2012	Samuel Testing Co	Mr Francois Fouche	Customer ServiceCall	A Type	JHB East Rand	Aeroton

Click on the respective date to open up the cyclical activity for editing or completing.

## The Diary Planner

Open your diary planner to view any planned recurring activity. Note that all recurring activities are marked with this icon - 

Show diary planner for:

<	Today	>	12 November 2012	Day	Work Week	Week	Month	Timeline
Monday								
🔄 Sam test 2 - William Delport Mr - - 1st SW Review								
🔄 Sam test 2 - William Delport Mr - - Approach to Go Live								
🔄 Samuel Testing Co - Francois Fouche Mr - Manager - Customer ServiceCall								

Editing the cyclical activities will open up the below form that allows you to change the date of the activity or complete it.

 **Edit Appointments**

Appointment Details \* = Required Fields

Sales Staff:

Company:  \*

Contact:  \*  Invite Contact?

011 824 2208 082 552 5921 [@sam.co.za](mailto:sam.co.za)

Location:  [View Map](#)

Activity:  \*

Task?

Start Date:

End Date:

**Activity is Scheduled in the Past. Defaulting to Completed**

Quote No:  Document

Quote Status:

Note:

Completed?