



## *BluWave crm*

### **Emailing & Document Management**

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## Emailing & Document Management

You can use the BluWave CRM to send emails to your customers, prospects and internal colleagues. In addition to this, these sent emails are automatically saved under the clients' activity history to ensure that all communication to them is stored.

In addition, you can store on the **BluWave crm** server all the documents you use for marketing purposes. These can then be included as attachments in the emails you send to customers. When a quote is generated in **BluWave crm** and then emailed to a customer you can attach any of the documents you have stored on the system.

### 1. Setting Up **BluWave crm** to Send Emails

To send an email from **BluWave crm**, each user is required to enter their email login name and password as well as the Simple Mail Transfer Protocol (SMTP) settings under the "Edit my Profile" menu. Please see below.

#### Step 1. Navigate to the "Edit my Profile" Menu under System Setup.

The screenshot shows the 'Edit User Details and Roles' form in the BluWave CRM. The form is divided into several sections:

- Search and Quick Create:** Includes a search bar and a 'Quick Create' button.
- Calendar:** A calendar for September 2011 is visible on the left side.
- User Details:** Fields for Full Name (samuel), User Name (samuel@thirdwave.co.za), Branch (Johannesburg), Designation (App consultant), Telephone (0781112745), Cell, and Email (samuel@thirdwave.co.za).
- Active and Monthly Target:** Active is checked, and Monthly Target is 10000.
- SMTP Settings:** A section for configuring email settings, including SMTP, User Name, and Password fields, and a 'Test Email Settings' button.
- Roles:** Checkboxes for User, Manager, Executive, System Admin, and Setup are all checked.
- Buttons:** 'Update Details', 'Update & New', and 'Cancel' buttons are at the bottom.

**NB:** Each user that will send emails via BluWave CRM is required to enter these email details under their profile.

#### Step 2. Enter the required SMTP details on the fields shown above.

For example for a user using Gmail for as their primary email address. The SMTP details will be as follows:

**SMTP:** smtp.gmail.com

**User Name:** users email address (e.g. samuel@gmail.com)

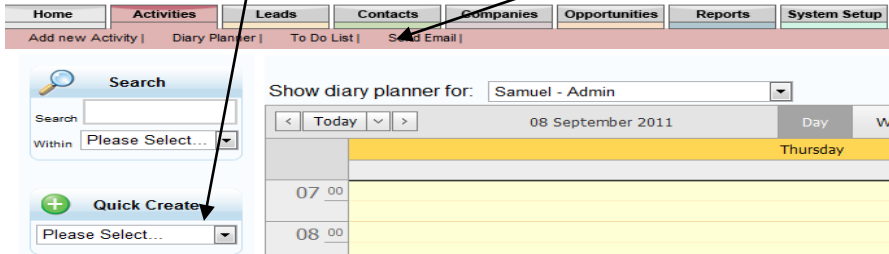
**Password:** Password you use to log in your Gmail account

Once done, click on "Update Details" to save the settings. You are now ready to send emails via the BluWave CRM.

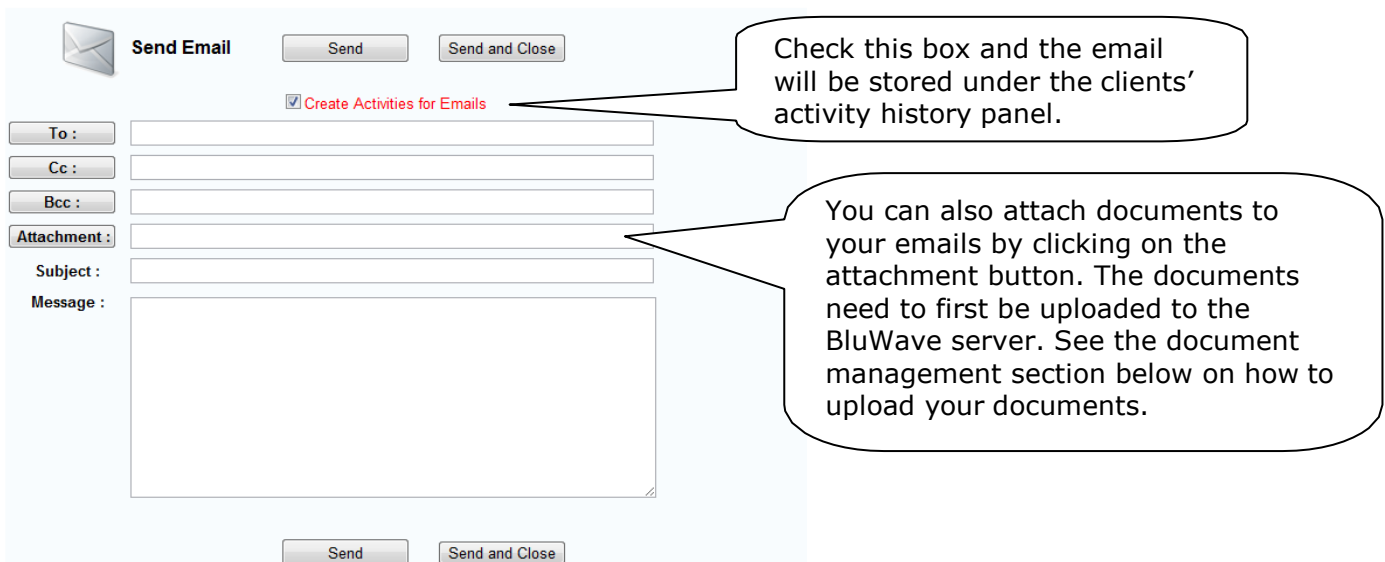
## 2. Sending Emails from **BluWave crm**

Follow the steps below to send an email via BluWave CRM.

Navigate to the “Send Email” sub menu under the Activities Tab. You can also access the send email functionality from the “Quick Create” menu.

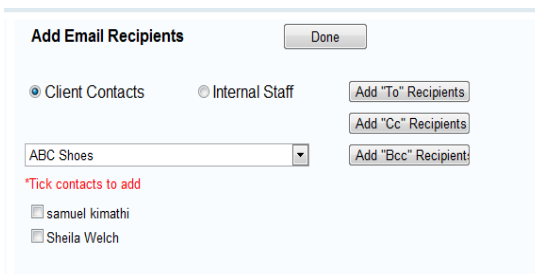


The email form then opens up allowing you to enter the email addresses of the recipients and type the message as shown below.



You can send an email to either a contact person under the Companies in BluWave and also to users loaded as sales staff in **BluWave crm** (Internal Staff). Use the To,Cc, or Bcc buttons to select the contacts. This options also gives you access to internal staff members should you want to include them in the email you are sending.

Alternatively, you can type in the email addresses of the recipients in the respective fields.



Select the company from the drop down list to access contacts loaded for that company.

Tick the required contacts and add them to the email list by clicking on either To, Cc or Bcc.

Click on the internal staff radio button to add internal email addresses.

Click “Done” and you will be returned to the email form to complete the sending.

The contact email addresses will now be added to the respective fields on the email form and you can now send the email. The email will then be filed under the activity history panel for the client.

### 3. Emailing a Quotation with an Attachment

When you create a quotation in **BluWave crm** you can then email the quote to the customer – it also BCC's the sales person to whom the quote belongs. When this email is sent, you can also attach any documents you have loaded into the Document Management area of the system. You may for example wish to include a brochure or product datasheet with your quotation.

You can also attach documents to your emailed quotation by clicking on the attachment button.

### 4. Document Management

Use the Document Management function of **BluWave crm** to store all your marketing documentation that your sales team will use to send to customers such as brochures, specifications and pictures. Once loaded onto the **BluWave crm** server, they can be used by your sales team to forward to customers via the Email function of **BluWave crm** or by attaching them to quotations prepared in **BluWave crm**.

In addition, if you prepare customer proposals or quotations outside of **BluWave crm** then each sales person has a private folder where he can store his quotations and attach them to the sales opportunity. In this way they can be accessed by management from the opportunity and can be forwarded by the sales person from the **BluWave crm** email function.

#### Shared Document Storage Folders

You can create multiple folders and subfolders on the BluWave server to save your documents in an organised fashion. All users have access to the documents folders except the private quotation „QUOTES“ folders. All users can view, email and download these shared documents. In addition, all users can upload documents to these folders. However only users with Set Up rights may delete a document from the document storage area.

#### Private Quotation Document Folders

Each user has a folder called **Quotes** where he can store his quotations. Only the sales person and his managers can access that folder – it is not shared with the other sales staff. We recommend that each user creates a **quotes** folder for each year under his quotes folder so that the quote documents can later be archived. Thus each user will have a 2011 quotes and 2012 quotes folder etc. underneath his “**Quotes**” folder.

## Uploading A Document to the *BluWave* crm Server

Determine what folders and subfolders you would like to have on the server. E.G. Brochures, Specification Sheets, etc. Each Folder may have any number of sub-folders. There is a maximum of a 2 level hierarchy for setting up folders.

**Step 1:** Navigate to the Document Management menu under System setup as shown below

The screenshot shows the BluWave CRM navigation menu with 'System Setup' selected. Under 'System Setup', 'Document Management' is highlighted. The main content area shows the 'Document Management' section with an 'Upload your Files to the Server' form. The form includes a 'Choose File' button (with 'No file chosen' text), a text field for 'Description of your File', and a dropdown for 'Folder/Subfolder to save on Server' (set to 'Brochure \'). An 'Add/Edit Folders' button is located to the right of the dropdown. Below the form is a table of existing files.

Uploaded	Folder	Sub Folder	Sales Rep	File Description	File Name			
14/09/2011	Brochure	Test	Samuel - Admin	Document template	Document template.doc	<a href="#">Dload</a>	<a href="#">View</a>	<a href="#">Del</a>

**Step 2:** Create the relevant folders on the server by clicking on the “Add/Edit Folders” button and this will open the form below.

The screenshot shows the 'Document Folder Maintenance' form. The 'Add Folder' radio button is selected. The 'Type New Folder Name' field contains 'Quotes 2011'. The 'Add Sub-Folder' radio button is unselected. Below it, there is a 'Select Existing Folder' dropdown and a 'Type New Sub Folder Name' field. At the bottom, there are 'Save' and 'Done' buttons.

	Folder Name	Sub Folder Name
<a href="#">Delete</a>	Brochure	
<a href="#">Delete</a>	Quotes	
<a href="#">Delete</a>	Quotes	Quotes 2010
<a href="#">Delete</a>	Quotes	Quotes 2011

Select **Add Folder** to add the first level of folders – just enter a folder name and click **Save**. Select **Add Sub-Folder** to create sub-folders. Select the **Folder** you wish to create sub-folders for then type in the **sub-folder name** and click **save**. Click **“Done”** to exit from this form

**Step 3:** Upload your documents by clicking on the “**Choose File**” button and navigate to the location where your files are saved on your computer. Double-click on the file name to select it. The file name will display in red text next to the Choose file button.

The Description field then defaults to your selected file name – but you can change the file description to something appropriate so that each user knows what the document is. Lastly, specify where to save it by selecting a **BluWave crm** folder and/or sub-folder from the drop down list.

**Document Management**

**Upload your Files to the Server**

Select your file to Upload: **Choose File** Document template.doc

Description of your File: Document template

Folder/Subfolder to save on Server: Brochure \ [Add/Edit Folders](#)

[Upload File](#)

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Filter files: Folder: (All Folders) Sub Folder:

Uploaded	Folder	Sub Folder	Sales Rep	File Description	File Name			
14/09/2011	Brochure	Test	Samuel - Admin	Document template	Document template.doc	<a href="#">Download</a>	<a href="#">View</a>	<a href="#">Delete</a>

Windows Explorer window showing the file selection process:

- Open dialog box
- Location: training
- Files listed:
  - bluwave Manual.doc (01/09/2011)
  - Details of Web Service (2).docx (07/09/2011)
  - Document template.doc (14/09/2011)
  - email send.doc (14/09/2011)
  - pics for docmgt.docx (14/09/2011)
  - Push Graph.doc (02/09/2011)

Click “Upload File” to upload your document to the server. This could take a few seconds. The file uploaded will now be displayed in the table on the lower half of the Document Management form.

**NB: Files to be uploaded need to be less than 2 Mb in size.**  
**Formats of files supported include pdf, doc, docx, xls, xlsx, ppt, pptx, zip, jpg and bmp**

**Note that there is security over the “Quotes” folders. If you have only User level security then you can only view the Quotes folder that belongs to you. All users with Manager or Exec security level users can view all the Quotes folders of all users.**

## 5. Attaching a Quotation/Proposal/Tender Document to an Opportunity

If you create a proposal, quotation tender or costing document that you wish to attach to an opportunity in **BluWave crm** then you can upload this the **BluWave crm** document management and attach it to a specific opportunity.

**Edit Opportunity** [Update] [Cancel]

Opportunity Details

Sales Staff: Samuel - Admin Status: Quote Stage

Company: AMC Manufacturing Probability %: 90

Contact: Samuel Kimathi Mr Value: 250000

Opportunity Name: Super Steel Next Activity: Quote Follow Up

Expected Order Date: 30/09/2011 Activity Date: 22/09/2011

Product: Delta T Controller - Delta Quote No: [Create Quote](#)

Note:

Attachment: Quote.docx [View File] [Update] [Cancel]

To attach a document to an opportunity you can browse from the opportunity in **BluWave crm**. Click on the "Attachment" button to link a document.

You can upload a new document to the document management function from here, or select a document that was previously uploaded. Click on the Select link next to the document to link it. Clicking the "View file" button opens up the attached document.

**Document Management** Select an existing file or Upload a new file and select it.

**Upload your Files to the Server**

Select your file to Upload: [Choose File](#) No file chosen

Description of your File:

Folder/Subfolder to save on Server: Brochure \

[Upload File](#)

Folder: (All Folders) Sub Folder: (None)

	Uploaded	Folder	File Description	File Name
<a href="#">Select</a>	15/09/2011	Brochure	Details of Web Service (2)	Details of Web Service (2).docx
<a href="#">Select</a>	14/09/2011	Brochure	Document template	Document template.doc
<a href="#">Select</a>	15/09/2011	Quotes	Super Steel Quote	Quote.docx

## 6. Technical Information: Documents Stored on the **BluWave** *crm* Server

Documents stored on the **BluWave** *crm* server are backed up separately from the **BluWave** *crm* data. **BluWave** *crm* itself is backed up several times a day. The documents however are only transferred to a backup storage area at the end of each week. All the documents are encrypted, they are not stored as entire files as in a windows file storage system. The data is only accessible via the **BluWave** *crm* server database and the **BluWave** *crm* application. Thus they are very secure.