



BluWave crm

List Manager Training Course

The **BluWave crm** List Manager has two primary functions.

- Firstly, it can be used to generate a mailing list for the purpose of sending batch emails or sms's to your customers, leads and prospects.
- Secondly, it can be used to export data to excel for the purpose of further analysis should you require to do further analysis, reporting or graphing on your **BluWave crm** data.

NB Since you can export the entire **BluWave crm database to Excel via this function, access to this function should be controlled – it should be restricted to strategic senior individuals.** To protect your data, users require specific rights in **BluWave crm** in order to access this function – these rights can only be granted by the system administrator.

BluWave crm does not have a function to send batch emails and SMSs. We recommend that all **BluWave crm** customers open a web-based mailing account with a service provider that offers batch email and sms services. These services are designed to effectively manage “unsubscribes” so that you remain compliant with the South African Consumer Protection Act. **BluWave crm** will simply generate the lists based on the leads, prospects and customers updated in **BluWave crm**.

We recommend as an example, TouchbasePro. This is an inexpensive, local and easy to use web-based batch email and SMS tool. This product will read the lists that are generated by **BluWave crm** List Manager.

Accessing List Manager

To access this tool, the specific user needs to have “Executive” and “List” permissions granted to them under the Administer Users page; your system administrator will be able to grant specific users this permissions.

NB: Since you can export the entire *BluWave crm* database via this function, access to this function should be controlled – it should be restricted to strategic senior or senior marketing staff.

Access List Manager by clicking on the link as shown below:



There are 6 different views available:

- A. Companies and Contacts
- B. Leads
- C. Companies and Activity History
- D. Companies and Opportunities
- E. Company Invoice History
- F. YTD and MTD Sales History

Searching and Filtering in List Manager

List manager allows you to search and filter for data in various ways:

1. Type a Single Value into a Column e.g. one sales person.
2. For Multiple Values use the Lookup List to check all the search criteria for a specific column – e.g. if you want a specific list of 10 or 20 Industries.
3. For logic criteria such as all client types with the word reseller in them, or a range of dates or values then you can use the Advanced Filter.

The screenshot shows the List Manager interface with the following callouts:

- Use the text boxes in respective fields to type in what you are searching for E.g. company name**: Points to the search boxes in the table header.
- Sorts all company names and other fields in ascending or descending order**: Points to the sort icons in the table header.
- Allows you to export filtered data to your local PC in 3 formats as shown**: Points to the 'Export to XLS', 'Export to XLSX', and 'Export to CSV' buttons.
- A filter is created as you search on the different rows in your data**: Points to the filter expression 'Begins with([Company], 'ab') And Begins with([C/P], 'c')' at the bottom of the table.
- The search tool allows you to select and deselect the fields you want to filter the data on as shown below**: Points to the 'Apply Filter' dialog box.

The table displays the following data:

Company	C/P	Sales Staff	Branch	Account No	Type
ab	d				
ABSA VEHICLE MANAGEMENT	C	Tania Cooke-Tonnesen	Bryanston		Inactive Customer
ABSA VEHICLE MANAGEMENT	C	Tania Cooke-Tonnesen	Bryanston		Inactive Customer

The filter expression is: `Begins with([Company], 'ab') And Begins with([C/P], 'c')`


The 'Apply Filter' dialog box shows the following options:

- C
- P
- S

A. Companies and Contacts List

This view allows access to all customers, prospects and corresponding contacts that have been loaded on the BluWave CRM.

All the details entered for the clients i.e. physical and postal addresses, client type, sales rep, area, source etc as well as all the contacts loaded under the clients will be available on the grid to allow the user to filter for the information or contact people they are looking for.


List Management

Select View Companies and Contacts
Export to XLS
Export to XLSX
Export to CSV

Company	C/P	Sales Staff	Branch	Account No	Type
180 Degrees(Pty)Ltd	P	Allan	Bryanston		Active Prospect 1
24-7 SECURITY	P	Allan	Bryanston		Active Prospect
24-7 SECURITY	P	Allan	Bryanston		Active Prospect
3D Design	P	Allan	Bryanston		Inactive Prospect
3D Design	P	Allan	Bryanston		Inactive Prospect
3D International	P	Tania Cooke-Tonnesen	Bryanston	3D00001	Active Prosp 30
3D International	P	Tania Cooke-Tonnesen	Bryanston	3D00001	Active Prosp 30
3D International	P	Tania Cooke-Tonnesen	Bryanston	3D00001	Active Prosp 30
3D International	P	Tania Cooke-Tonnesen	Bryanston	3D00001	Active Prosp 30
3D International	P	Tania Cooke-Tonnesen	Bryanston	3D00001	Active Prosp 30
3D International	P	Tania Cooke-Tonnesen	Bryanston	3D00001	Active Prosp 30
3D International	P	Tania Cooke-Tonnesen	Bryanston	3D00001	Active Prosp 30
3-D INTERNATIONAL CO gg	P	Ronita Stroebel	Bryanston	Z000001	Active Prospect
3-D INTERNATIONAL CO gg	P	Ronita Stroebel	Bryanston	Z000001	Active Prospect
3-D INTERNATIONAL CO gg	P	Ronita Stroebel	Bryanston	Z000001	Active Prospect

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[Create Filter](#)

Practical Example

Search for all customers and prospects in PTA east, PTA, Centurion and Midrand


Steps to follow

1. From the list manager, select the Companies and Contacts view
2. Use the magnifying glass on the C/P row to select customers and prospects and apply filter.
3. Go to the "Area" field and use the search to select the required areas; in this case, PTA east, PTA, Centurion and Midrand
4. The system will then pick up all companies and contacts as per the criteria used above and you can now export it as shown in the example below.

Company	C/P	Area	Opened	Branch	Source
A.G. PRODUCTS	P	Midrand/Halfway	06/12/1994	Bryanston	
ABB - EWA & EIB	C	Midrand/Halfway	13/03/2008	Bryanston	
ABB SA - ATMA (ROBOTICS) DIVISION	C	Midrand/Halfway	20/09/2002	Bryanston	
ABB SA - ATMA (ROBOTICS) DIVISION	C	Midrand/Halfway	20/09/2002	Bryanston	
ABC Hansen Africa (Pty)Ltd	P	Pretoria	21/09/2011	Bryanston	Cold Call
Absolute Containers	P	Pretoria	08/10/2010	Bryanston	Cold Call
ACCESS TELECOMMUNICATION SYSTEMS	P	Pretoria	20/01/2004	Bryanston	Web Site

B. Leads List

The leads view shows a list of all the leads and corresponding information entered including the notes that may have been entered after following up on this leads. You may use this view to filter for leads that have been entered in a given time and have been marked as “hot” with the intention of sending them a promotional price list.


List Management

Select View Leads Export to XLS Export to XLSX Export to CSV

Company	Sales Staff	Title	Initials	First Name	Surname
Calgro M3 Holdings	Tania Cooke-Tonnesen	Mr	P	Phillimon	Disemelo
Consensio Marketers	Tania Cooke-Tonnesen	Mr	S	Simanga	Humphrey
EMS	Tania Cooke-Tonnesen			Julius	Mekwa
Growth-Point Properties	Tania Cooke-Tonnesen	Ms	L	Leah	Smit
Ideal Intellect	Tania Cooke-Tonnesen	Mr	P	Prashan	Sukhu
Ignition	Tania Cooke-Tonnesen			Greg	Baleson
JWD Engineering	Tania Cooke-Tonnesen	Mr	J	Jason	Davies
LMM Fitment Centre	Tania Cooke-Tonnesen	Mr	L	Lee	Maxwell
Lovell Industries	Tania Cooke-Tonnesen	Mr	K	Kyle	Lovell
Mamba Strike Force	Tania Cooke-Tonnesen	Mr		Leon	Coxen
MPB Group	Tania Cooke-Tonnesen	Mr	E	Elmore	Preller
New Integrated Credit Solutions	Tania Cooke-Tonnesen	Mr	J	Joe	Mahlangu
Pikitup	Tania Cooke-Tonnesen	Ms	D	Dumisile	Mgaga
Real Estate & Property Services (Pty) Ltd	Tania Cooke-Tonnesen	Mr	J	Jaco	Crous
Remax One	Tania Cooke-Tonnesen	Mr	A	Alex	Demianenko

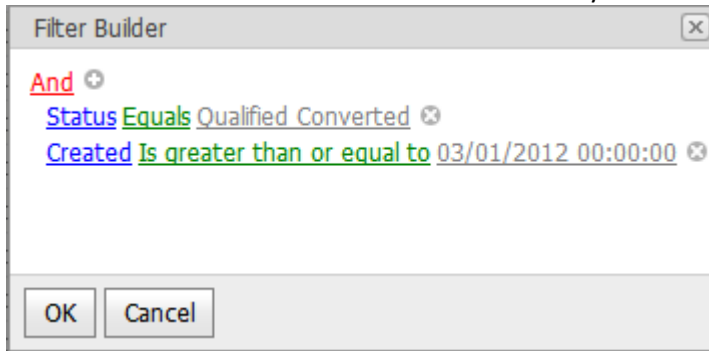
Practical Example

Leads that have been loaded and converted to prospects in the last 6 months

Steps to follow

1. From list manager, select the Leads view.

- Click on the search field on the "Status field" and select "Qualified Converted" to select leads who have been converted and apply filter.
- Use the create filter to select leads who have only been loaded in the last 6 months as shown below



- You will now have a list of only the leads that have been loaded in the last 6 months and converted with all the information that had been entered for them as shown below.

Company	Title	Initials	First Name	Surname	Designation	Cell
Webcafe Marketing				Carina		083 591 7339
Lovell Industries	Mr	K	Kyle	Lovell		082 338 7430
LMM Fitment Centre	Mr	L	Lee	Maxwell	Owner	079 697 8913
Ronn Communications	Mr	R	Rajan	Govender	CEO	082 548 6079
Pikitup	Ms	D	Dumisile	Mgaga	Sales & Marketing Agent - Custome	071 151 5816
Consensio Marketers	Mr	S	Simanga	Humphrey	Creative Communications Manager	082 975 7879
Cobra	Mr	F	Fred	van Zyl	Engineer	

C. Companies and Activity History List

This view will show you a list of all companies loaded on the CRM as well as a history of all activities under them and the responsible sales person. It also shows any notes that were entered for the activities and also indicates whether the activity was a task or an appointment and whether it was completed. Emails filed are also included.

The view also allows you to search for any activities loaded in a given time period and also gives you access to the company information e.g. physical address, area, etc to allow for searching on this fields as well. NB: you can also search through the text of all the notes for all activities and emails that have been filed.

The screenshot shows the 'List Management' interface. At the top left is an envelope icon and the title 'List Management'. Below this is a 'Select View' dropdown menu set to 'Companies and Activity History'. To the right are three buttons: 'Export to XLS', 'Export to XLSX', and 'Export to CSV'. A table with the following columns is displayed: Company, C/P, Description, and Notes. A callout bubble points to the 'Notes' column with the text: 'Use "Ctrl" and "F" on your keyboard to search for text in the notes area,'.

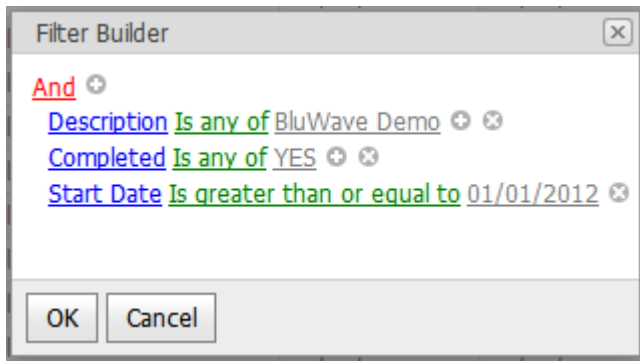
Company	C/P	Description	Notes
180 Degrees(Pty)Ltd	P	Sales Call	I sent the information which he asked for.
180 Degrees(Pty)Ltd	P	Support Call	Ms Shiela Welch & Mr Chops Huysaman to meet and d
180 Degrees(Pty)Ltd	P	BluWave Demo	The meeting has been confirmed.
180 Degrees(Pty)Ltd	P	Quote Follow Up	Follow up QuoteNo: 1033
180 Degrees(Pty)Ltd	P	Quote Follow Up	Follow up QuoteNo: 1008
180 Degrees(Pty)Ltd	P	Email Sent	Hi Everyone Ok, I am going to try my holiday again. I
180 Degrees(Pty)Ltd	P	BluWave Demo	They are using Dolphin which is a system that was de
180 Degrees(Pty)Ltd	P	Send Proposal	sent for 3 users on BluWave
180 Degrees(Pty)Ltd	P	Email Sent	
180 Degrees(Pty)Ltd	P	Email Sent	Hi Chops Thank you for taking the time to review our
24-7 SECURITY	P	Follow up call	Vaughan has not had the chance to dit down with his
24-7 SECURITY	P	Sales Call	Vaughan needs info which he can show to his superio
24-7 SECURITY	P	Follow up call	Vaughan has asked me to call him after 2weeks ,they
24-7 SECURITY	P	Follow up call	Vaughan has been busy with other programmes withi
24-7 SECURITY	P	Quote Follow Up	Follow up QuoteNo: 1002

Practical Example

Customers and Prospects who attended a Demo this year

Steps to follow

1. Navigate to the companies and activity history view in list manager
2. In the description row, click on the magnifying glass and select Demo from the list. This will filter only for all Demo activities that were booked.
3. Use the filter to select only activities for this year.



4. In the completed row, use the magnifying glass to select only completed activities.
5. A list of all customers and prospects who have attended a Demo this year will be created and will include any notes that were entered for the activity. All other company details are also included.

Company	Description	Start Date	Sales Staff	Notes
		01/01/2012		
MAN Truck and Bus Centre JHB	BluWave Demo	06/01/2012	Tania Cooke-Tonnesen	Met with 2 Directors - Mike and E
AVENG E+PC	BluWave Demo	20/01/2012	Tania Cooke-Tonnesen	Heinrich Kukuk & Brendan Creav
ESPA TECHNOLOGIES	BluWave Demo	23/01/2012	Tania Cooke-Tonnesen	Met with the 2 Members - Vic an
Proware	BluWave Demo	23/01/2012	Tania Cooke-Tonnesen	based in Bloem. Provide POS solu
HI-FORCE HYDRAULICS	BluWave Demo	24/01/2012	Tania Cooke-Tonnesen	look at how to get reps going gr
Instrotech(Pty)Ltd	BluWave Demo	24/01/2012	Tania Cooke-Tonnesen	Demo of BluWave please invite a

D. Companies and Opportunity History List

This view will allow a user to access and filter on the following information.

- All companies; customers and prospects that have opportunities. This includes companies that have been quoted using BluWave's quoting function and those with opportunities raised for them.
- Sales person who raised the opportunity.
- Statuses of all the active opportunities as well as sold and lost opportunities and the date when they were created.
- Potential value for each opportunity and corresponding probability.
- Expected sale date entered.
- Any notes entered for opportunities and for lost opportunities; the reasons lost and competitors involved.
- Any other company details for clients with opportunities.



List Management

Select View Companies and Opportunities Export to XLS Export to XLSX Export to CSV

Company	A/S/X/Y	C/P	Sales Staff	Opportunity Name
180 Degrees(Pty)Ltd		P	Samuel Kimathi	
24-7 SECURITY		P	Samuel Kimathi	
3D International		P	Tania Cooke-Tonnesen	
3D International		P	Tania Cooke-Tonnesen	
3D International		P	Tania Cooke-Tonnesen	
3D International		P	Tania Cooke-Tonnesen	
3D International		P	Tania Cooke-Tonnesen	new Cupboards for 18 Curzon
3D International		P	Tania Cooke-Tonnesen	
3D International		P	Tania Cooke-Tonnesen	
3D International		P	Tania Cooke-Tonnesen	quote for JHB internal
3D International		P	Tania Cooke-Tonnesen	System for internal & external Sales
3D International		P	Tania Cooke-Tonnesen	Test Sat 3/3/2012 3pm
3D International		P	Tania Cooke-Tonnesen	quote for JHB internal & External S
3D International		P	Tania Cooke-Tonnesen	system for internal sales team
3D International		P	Tania Cooke-Tonnesen	system for external sales team

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Practical Example

All BluWave opportunities with the status “Sold” from 01/01/2012

Steps to follow

1. Navigate to the “Companies and Opportunities” view in list manager
2. Select all Bluwave products either from the “product codes” or “description” and apply filter se the filter
3. Select only “Sold” opportunities “A/S/X/Y” row and apply filter
4. Use the filter to search for only opportunities bought from 01/01/2012

[Date Sold/Lost Is greater than 01/01/2012](#) ✕

[A/S/X/Y Is any of S](#) ⊕ ✕

5. The system will then show a list of all opportunities as per criteria used above

Company	A/S	Product Description	Potential Va	Date Sold/Lost
	S			01/01/2012
ALTECH CARD SOLUTIONS	S	BluWave CRM 10-14User	42000	09/01/2012
BTO2 Solutions	S	BluWave CRM 10-14User	45000	02/04/2012
CCG Cable Terminations (Pty) Ltd.	S	BluWave CRM 10-14User	32000	24/04/2012
ESPA TECHNOLOGIES	S	BluWave CRM 6 User	33000	29/01/2012
FUCHS LUBRICANTS	S	BluWave CRM 15-20User	68400	23/04/2012
LANOY MEDICAL	S	BluWave CRM	10000	03/02/2012
Probe CAMS	S	BluWave CRM 9 User	28000	31/03/2012
Southern Chemicals (Pty) Ltd	S	BluWave CRM 5 user	24000	05/06/2012
SUN ACE SOUTH AFRICA	S	BluWave CRM 12User	62000	09/07/2012
TEMPERATURE CONTROLS (PTY) LTD	S	BluWave CRM 6 User	30000	04/09/2012
TOP TRAILERS	S	BluWave CRM	54000	03/02/2012

E. Company Invoice History List

BluWave CRM can read invoices from your financial system. This then allows the user to see what each client has been purchasing every month by product or product group under financials. The Company invoice history in List Manager allows you to search and filter on this history.

Company	AccountNo	ClientProspect	SalesRep	InvoiceNumber	InvoiceDate	ProdID
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF393564	23/06/2011	F21606
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF400009	14/09/2011	F90906
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF401853	06/10/2011	G02506
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF401853	06/10/2011	PT5106
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF402136	10/10/2011	F90806
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF400938	26/09/2011	PT4306
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF400938	26/09/2011	PT5111
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF400938	26/09/2011	PT5111
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF403264	21/10/2011	F90806
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF403264	21/10/2011	G02506
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF403264	21/10/2011	G14611
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF406486	29/11/2011	F90806
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF406486	29/11/2011	F90906
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF406486	29/11/2011	P05206
SULIMAN ISMAIL MIA CO	1014	C	Freddie Eloff	IF406486	29/11/2011	PT5106

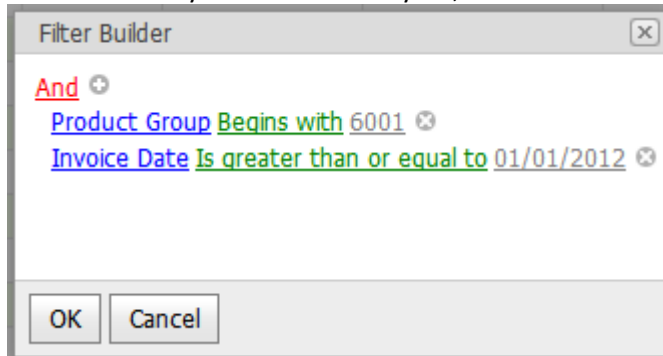
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Practical example

Show all products under product group “6001” that have been invoiced this year.

Steps to follow

1. Navigate to list manager and select the “Company Invoice History” view
2. From the product group, select the group you want to filter for. i.e. 6001 and apply filter
3. To filter for only invoices for this year, use the filter to search for only this year’s invoices



4. You will now have a list of all the companies that have been invoiced for products falling in group “6001” for this year

Company	AccountNo	ProductDescription	InvoiceDate
			01/01/2012
HARMONY GOLD MINING COMPANY LIM	1003	CEPLATTYN RN 50K	25/07/2012
HARMONY GOLD MINING COMPANY LIM	1003	CEPLATTYN KG10 HMF 180K	18/07/2012
HARMONY GOLD MINING COMPANY LIM	1003	CEPLATTYN KG10 HMF 180K	12/06/2012
HARMONY GOLD MINING COMPANY LIM	1003	CEPLATTYN RN 50K	12/06/2012
HARMONY GOLD MINING COMPANY LIM	1003	CEPLATTYN KG10 HMF 180K	10/04/2012
RPM LTD - AMANDELBULT	2011	CEPLATTYN KG10 HMF 50K	14/03/2012
RPM LTD - AMANDELBULT	2011	CEPLATTYN KG10 HMF 50K	14/03/2012