

## Adding/ Administering Users in BluWave CRM



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 with the 'System Setup' tab selected. Underneath, the 'Administer Users' sub-tab is active. The 'Security Roles' section is displayed, showing a table of existing users and a 'New User' button. A black arrow points from the 'New User' button towards the 'Administer Users' sub-tab.

Full Name	Branch	Active	User	Restricted User	Manager	Restricted Manager	Executive	System Admin	Setup	List	GP	Approval	Product Manager	Claim Leads	Restrict Pricelist	Create Non Stock
Byron Cooke-Tonnesen	Johannesburg	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Michelle Snyders	Johannesburg	<input checked="" 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"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thobanjalo Shangose	Johannesburg	<input checked="" 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"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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 below.

The screenshot shows the 'New User Details and Roles' form in the BluWave CRM. The form contains fields for Full Name, Branch, Designation, Telephone, Cell, and Email. Below these fields are checkboxes for 'Roles' and 'Do all Quotes from this user Require Approval?'. A black arrow points to the 'Save User Details' button at the bottom of the form.

Full Name: Hansie Keller Monthly Target: 0  
Branch: Johannesburg Date Captured: 11/04/2019  
Designation: Office Manager Active?:   
Telephone: 012 457 8956 Rep Code: HK  
Cell: 074 844 8574  
Email: hansie@keller.co.za 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  Claim Leads  
 Product Manager  Restricted User  Restricted Manager  Restrict Pricelist  Create Non-Stock Items

Buttons: 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. [If this user does get replaced by a new employee, the system administrator would create a new user and tick the “Active” checkbox. From a reporting side you will then be able to see where the previous employee’s trail end, and where the new employee’s trail begin]

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

- Navigation:** Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, Financials.
- Search:** Search bar with 'Please Select...' dropdown.
- Quick Create:** 'Please Select...' dropdown.
- Calendar:** Calendar for April 2018.
- User Details:** Full Name (Thobanjalo Shangase), Branch (Johannesburg), Designation (Developer), Telephone (0114626871), Email (thoba@bluwave.co.za).
- Monthly Targets:** No of Quotes (0), Target Quoted Value (0), Target Sales Value (0), GP Value (0), No of Units (0), No of Face-to-Face Visits (0).
- GIS Location:** Start and End GIS Location (Use Current Location, Select From Map), Rate Per Km (0).
- Active:**  (indicated by a black arrow).
- Approval Manager:** (Dropdown menu).
- 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:** SMTP (smtp.gmail.com), SMTP User Name (shangasett@gmail.com), SMTP Password (\*\*\*\*\*), SMTP Port (25).
- Roles:**  User  Manager  Executive  System Admin  Setup  List  GP  Approval  Claim Leads.  Product Manager  Restricted User  Restricted Manager  Restrict Pricelist  Create Non-Stock Items.
- Buttons:** Update Details, Update & New, Cancel.

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

On this page, 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 login for users who have left the company.
- Monthly Target- Indicates the monthly revenue target set for the sales representative.

