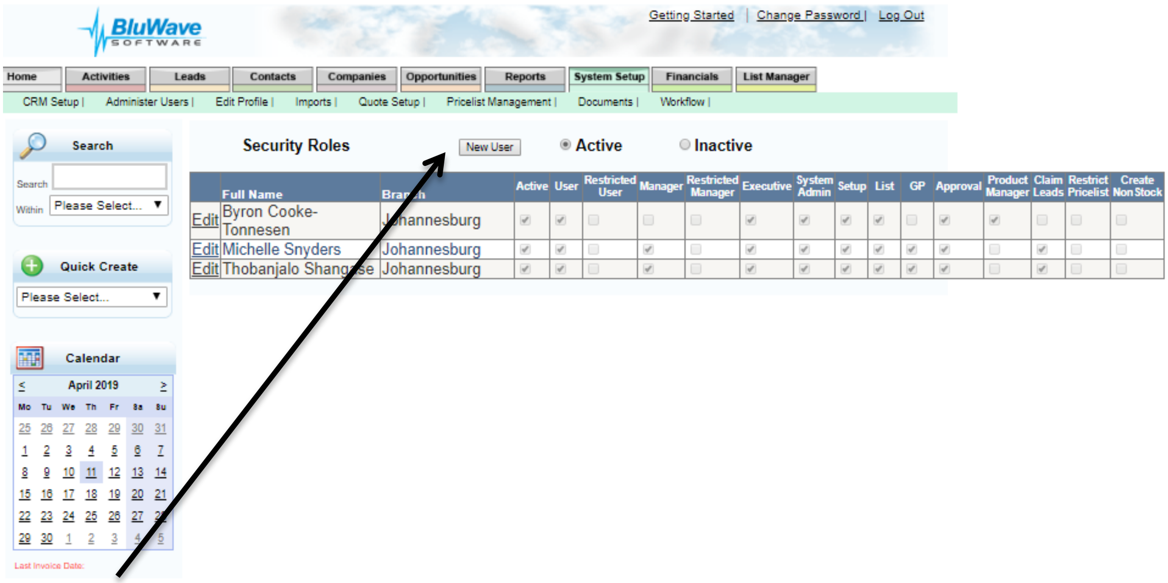
Adding/ Administering Users in BluWave CRM

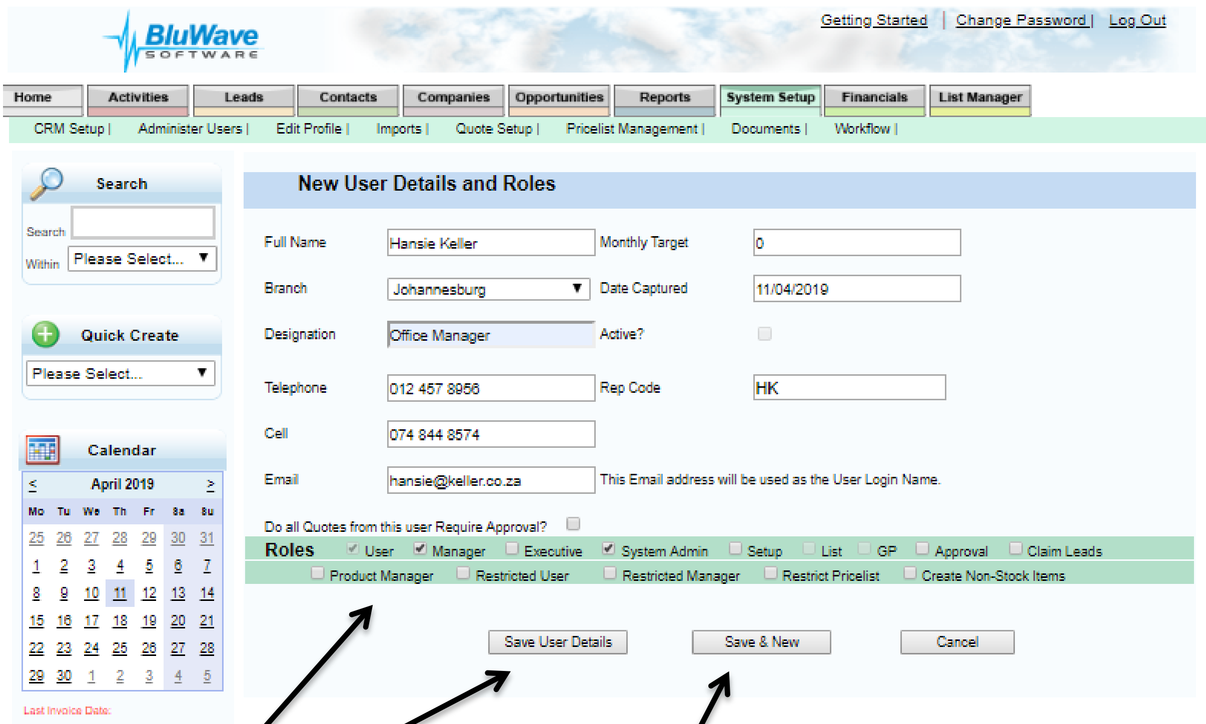
Add new users to BluWave crm as follows:

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.



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.



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.

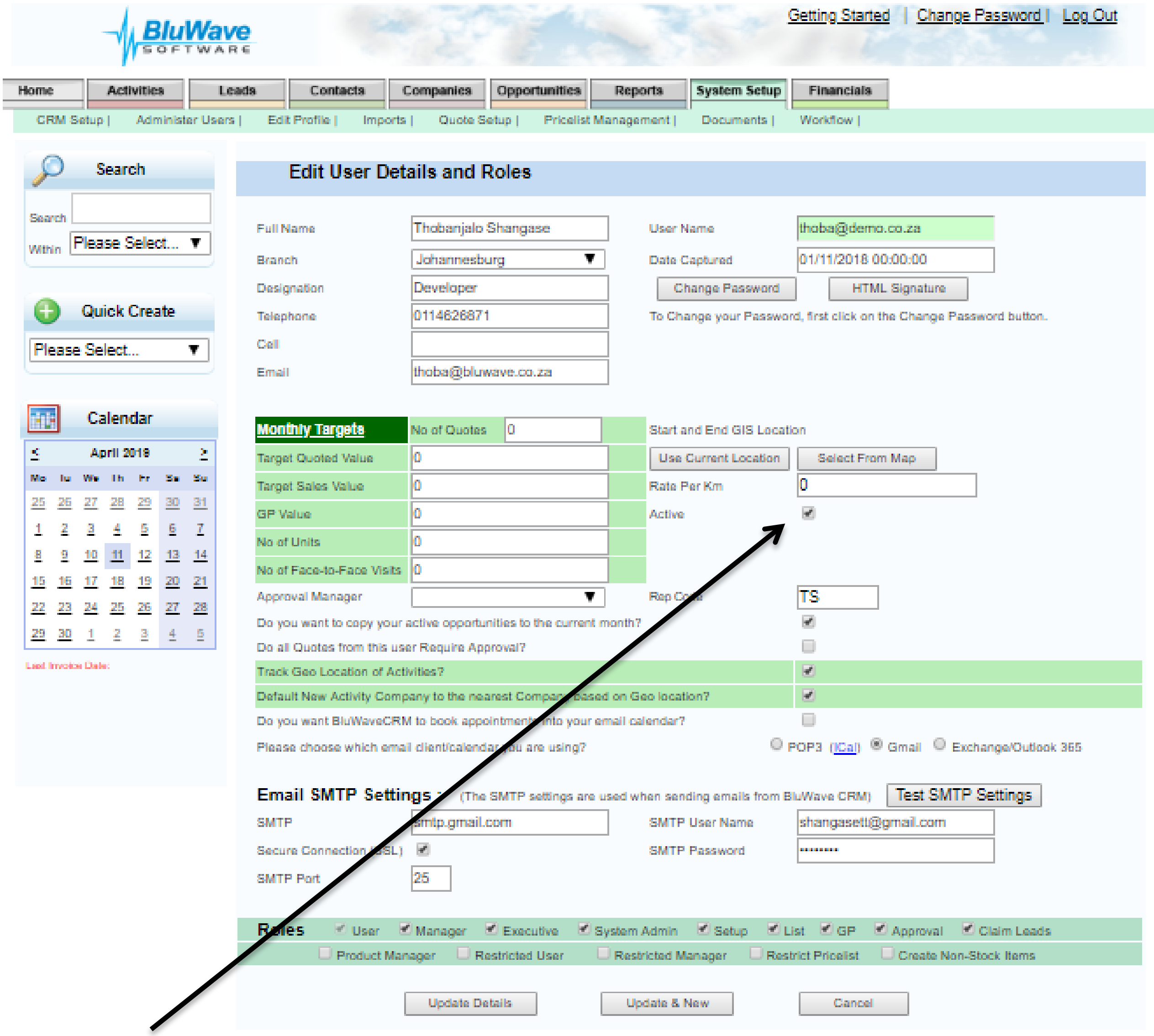
Click on "Save User Details" to create the account or "Save& New" should you wish to create an additional account. The user will then receive an email with their login credentials.

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]



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.

BluWave Security Roles

	Security Roles	User levels						Special Rights							
Main function	Description	User	Restricted User	Manager	Restricted Manager	Product Manager	Executive	Claim Leads	System Admin	Setup	List	GP	Approval	Restricted Pricelist	Create NonStock
ADD	Add companies & contacts, opportunity	✔	✔	✔	✔	✔	✔								
VIEW	View own company names	✔	✔	✔	✔	✔	✔								
	View all company names	✔		✔		✔	✔								
	View branch company names	✔		✔	✔	✔	✔								
ACCESS	Access own companies	✔	✔	✔	✔	✔	✔								
	Access branch companies			✔	✔	✔	✔								
	Access all companies					✔	✔								
	Access other users' schedules in the same branch			✔	✔		✔								
	Access other users' schedules across the system						✔								
EDIT	Edit accessed companies & contacts	✔	✔	✔	✔	✔	✔								
	Edit other users' activities & opportunities in the same branch			✔			✔								
	Edit own activities & opportunities only					✔									
	Reassign leads & opportunities, companies						✔		✔						
DELETE	Delete companies & contacts, opportunities								✔						
Special Abilities	User can claim leads loaded onto the system without having it assigned to them first							✔							
	Create, activate & deactivate users								✔						
	Modify dropdown lists									✔					
	Able to export data from system	N/A	N/A	N/A	N/A	N/A					✔				
	See GP % on financials (if sales are imported)											✔			
	Rights to approve quotes done by users												✔		
	Users can only quote using specified pricelist													✔	
	Used for product usage, allows user to add products not yet on the system														✔