



---

## Essentials Package Introduction



For support please contact: 011 462 6871 or [support@bluwave.co.za](mailto:support@bluwave.co.za).

## Table of Contents

1. Introduction.....	3
2. Setup & Configuration Manual.....	4
3. Additional Setup & Functions Manuals.....	5
4. Training Manuals.....	6
5. Revision History.....	7

## 1. Introduction

Thank you for choosing the BluWave Essentials package for your CRM needs.

BluWave CRM is a comprehensive online software system that can manage your customer interactions, track sales and so much more.

Your Essentials package includes all the documentation you will need in order to get you up and running with BluWave CRM.

In addition, your Essentials package entitles you to 3 (three) free of charge support tickets where you can request assistance regarding a specific topic from our friendly and knowledgeable support consultants. You may log these 3 tickets either by emailing us at [support@bluwave.co.za](mailto:support@bluwave.co.za), or by calling us on +27 11 462-6871

Further support ticket packages may be purchased for 10 topic specific support tickets- please request a quote at that time.

To get started with BluWave CRM Essentials, please click on the link below to download your documentation.

This includes the following documents:

- Essentials Package Introduction document. This introduction document will be your guide to setting up and configuring the system as well as guide the users in using the system (training documents).
- Training Manuals for your users.
- As well as Additional Manuals for more in depth knowledge on advanced functions and usage of the system.

BluWave also offers a range of training options designed to fast track your implementation process. Should you feel at any stage that you require training please contact our sales team and they will be happy to discuss your requirements and offer a training program to suit your needs.

Once you become familiar with BluWave, you may want to further explore the software capabilities with some of the more advanced features, such as creating workflows or integrating leads from your website or even Mailchimp email marketing software.

And don't forget our fortnightly newsletter contains many helpful tips on how to get the most out of your BluWave CRM.

## 2. Setup & Configuration Manual

The setup manual is divided into sections, each section is dedicated to a specific area/ function within the system.

Maintaining the order of topics in the manual will also ensure that all necessary configurations are completed, if required, for subsequent areas or functions, facilitating a comprehensive setup process.

Section	Overview
<b>Users</b>	<p>The user section will assist, by first adding in the different physical branches of the organization or different product ranges/lines or sister companies (if different letterheads are necessary for quoting purposes).</p> <p>For example: there might be physical branches in JHB or CT, but also different product ranges that need a different letterhead depending on what the client will be purchasing.</p> <p>Thereafter, adding users into these branches and making sure that each user has the different options on their user profiles completed.</p>
<b>Opportunities</b>	<p>An Opportunity is an entry on the system of a potential deal and should include a preliminary estimation of its worth (to populate the pipeline). As this opportunity progresses a quote could be added onto this entry.</p> <p>This section establishes the various stages to which opportunities/quotes could be assigned, along with additional information to track lost deals and identify the closest competitors.</p>
<b>Activities</b>	<p>Activities lays the foundation for diary management as well as planning next actions to follow up on a deal and customer management.</p> <p>Activities can be used to book appointments or tasks.</p>
<b>Companies</b>	<p>Companies are the clients within your database. They can be categorised as:</p> <ul style="list-style-type: none"> <li>• Prospects (a company/ client who has shown interest in the products/ services your organization sells and are being activity targeted by the sales team but have not bought yet.)</li> <li>• Customers (a company/ client who has bought from your organization before.)</li> <li>• Supplier (a company/ individual that provides the goods/ material or support needed to your organization)</li> </ul> <p>Please be aware that although the terminology used revolves around "company," individual clients will also be included in the database. Here, "company" denotes any business entity, be it an organization or an individual.</p> <p>This section will facilitate the setup of various categories and the collection of information from clients, which will be instrumental in generating comprehensive reports.</p>
<b>Leads</b>	<p>Most of this setup pulls through from the Companies section. Only the Leads Status options would need to be set up.</p>
<b>Contacts</b>	<p>This section not only aids in gathering the information required for generating bulk mail data but also in categorizing and labelling the various contacts accurately for reporting purposes.</p>
<b>Quotes</b>	<p>The quote section allows the setup of different templates per branch.</p> <p>Follow these steps to easily setup the quotes section (as per the manual):</p>

	<p><b>Step 1:</b> Decide on which <b>Input</b> the users would need to complete the quote. Only one input can be chosen for all the quotes/templates.</p> <p><b>Step 2:</b> Decide on which <b>Output</b> should be used for the quotes. Only one output can be chosen for all the quotes/templates. Please look at the appendix of the setup manual for examples.</p> <p><b>Step 3 – 6 :</b> Decide and set some defaults for the quotes as well as additional add ons such as header and footer images, terms and conditions and default email text.</p>
<b>Current Products</b>	<p>A Current Product can also be referred to as an assets, serialised equipment, subscriptions, or contracts.</p> <p>This section can be used to keep track of these kinds of products or services to your clients. Also remember to add the physical document to the asset for ease of reference later on.</p>
<b>Additional Setup</b>	<p>This section is a guide to additional ad hoc settings/defaults.</p>
<b>Document Management</b>	<p>This section explains where to add folders for the users to save documents in Bluwave, as well as where to search for documents once they have been uploaded to Bluwave or created by the system (quotes).</p>

### 3. Additional Setup & Functions Manuals

In addition to the setup manual there are other manuals that guide you in a specific area/function with more in depth knowledge.

Document Name	Document Number	Overview
<b>BluWave- Importing Data</b>	SM0013	This manual specifically explains how to import your data into the system via excel spreadsheets (in .CSV format).
<b>BluWave- List Manager</b>	SM0002	This manual looks at how to export data already added to the system to excel spreadsheets for easy updating as in the case of products/prices.
<b>BluWave- Auto BCC Email Filing in Outlook</b>	SM0047	This manual guides the IT department on how to use VBA code to email file all outgoing email to Bluwave so that the users don't need to worry about doing it.
<b>BluWave- Geo Location &amp; Travel Claim</b>	SM0010	If you would like your users to see on a map where they have travelled and to produce a travel claim report from the system, then there are a few settings to have in place. This manual takes you through the steps.
<b>BluWave- HTML Signature</b>	SM0001	This manual takes you step by step on how to add in the user's email signatures to Bluwave. This is essential when emailing quotes out of Bluwave.
<b>BluWave CRM- Quote Cover Letters</b>	SM0023	This manual is more detailed on where and how to set up your quote cover letters.
<b>BluWave- Password Management</b>	SM0049	Guides the System Admin and Users on how to retrieve or reset their log in credentials.

<b>BluWave CRM- Leads Web Service</b>	BW0005	This manual should be given to your website developer. This will feed all the leads entered onto your website’s contact us page into the Lead Section within Bluwave. No recapturing needed = time saved.
<b>BluWave- Mailchimp Integration</b>	SM0050	If you regularly send out bulk mails using the Mailchimp platform, you can easily integrate it with Bluwave. This would show your users which client received which newsletter and when. If clients unsubscribe or their email addresses bounce, that information will be visible in Bluwave as well.
<b>BluWave CRM- Workflows</b>	SM0016	Setting up workflows could automate task and emails to be sent to internal staff to remind them of certain next actions, notifying them of new assigned leads or companies. Or emails can be sent to clients to inform them of additional offers or next service dates- the possibilities are endless.

#### 4. Training Manuals

<b>Document Name</b>	<b>Document Number</b>	<b>Overview</b>
<b>BluWave CRM- Training Manual</b>	SM0018	The CRM Training Manual will take your user through adding in new clients, to booking interactions with them and setting up regular call cycles as well as creating and tracking the sales deal on the system.
<b>BluWave CRM- Leads Management</b>	SM0008	The Leads Management Manual will cover how to add a lead to the system and follow through to converting the lead to a company (prospect).
<b>BluWave BI- Training Manual</b>	SM0043	The BI Training Manual would for management but could also be used by the users. This manual goes through accessing and viewing the BI (Business Intelligence) reports, graphs and presentations that showcase the data input from the users as well as usage reviews.

## 5. Revision History

Version	Date	Updates
BW0022	06/05/2024	<ul style="list-style-type: none"><li>• Creation</li></ul>
BW0022.1	07/05/2024	<ul style="list-style-type: none"><li>• Refined some of the content</li></ul>