

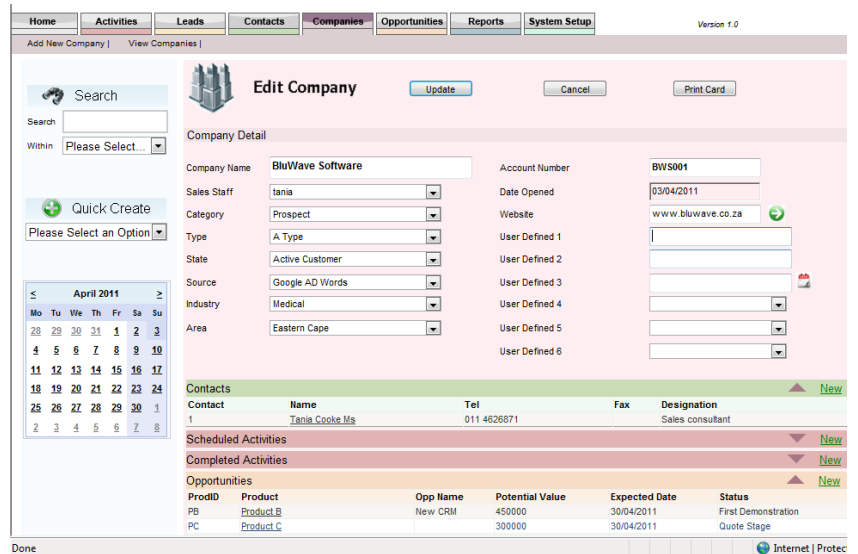


BluWave crm

Functional Summary

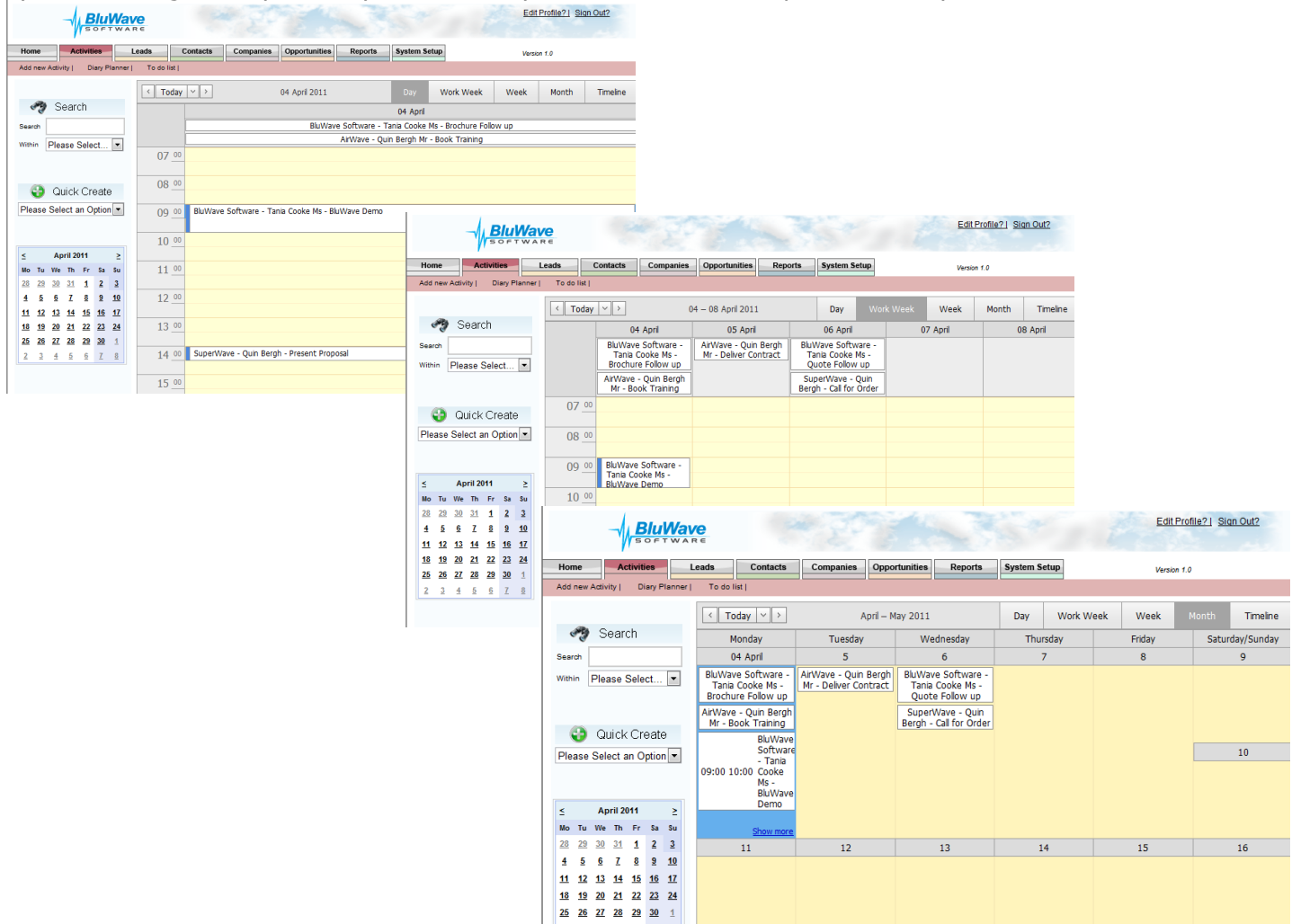
Customer and Contact Management

The Companies and Contacts databases stores and manages all your customers and prospects. Companies can be segmented into types, industries, areas and groups. User defined fields allow you to customize the system for your business. Any number of contact people can be stored per customer. Your customers can be allocated to your branches and sales staff within branches.



Activity and Diary Management

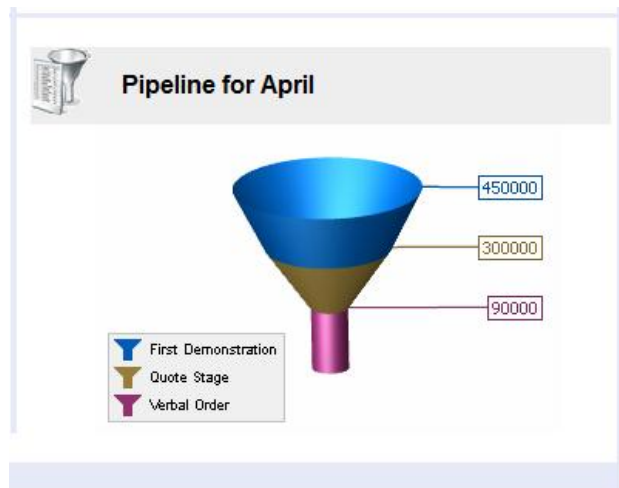
Schedule your customer and prospect follow-ups using the Activity Management function. The system manages daily, weekly and monthly views of each sales person's diary.



Opportunity Tracking (Managing the Sales Pipeline)

Use the Opportunity Tracking functions to manage new business acquisition.

- Define your own sales process for tracking the progress of your sales pipeline.
- The system generates a new business forecast based on expected order dates and sales probability percentages.
- Each sales person can view his pipeline visually on his homepage. Additional graphing on the sales person's dashboard details progress against target.



Performance Dashboard

This page presents a visual summary of the sales person's sales environment. The recent opportunities, activities, contacts and companies are displayed. A graphical "funnel" representation of your sales pipeline is represented. New leads flowing into the system are also visible.



Quotes Automation

Use this function to generate customer quotations. This function is a great productivity booster for a sales person as it achieves 3 processes from one input. Select the items to be quoted and then generate the quotation document – this can be emailed or printed for the customer. At the same time as you prepare the quote, the automatically posts this opportunity into your opportunity pipeline and also generates a quote follow-up activity for the sales person in the activity management function.

Automatic Push Graphs

A unique feature of **BluWave crm** is a function to allow you to configure the system to proactively send you regular statistics on your sales team's progress. Users can see their own stats and management can receive performance stats on their whole team.

There are currently 5 key graphs that can be requested at different levels (restricted by the users access levels) Company, branch or user and at a user specified frequency.

Currently the system can generate emailed graphs on the following statistics:

- No of New Enquiries
- No of Quotes issues v's a target no of quotes for a month
- Number of sales v's a target number of converted opportunities per month
- Sales forecast - value in the pipeline v's the targeted monthly turnover from new business
- Conversion rate of quotes to sales as a percentage.

Integration to Email & Calendaring Clients

BluWave crm integrates to Outlook and most web-based (such as Gmail) email and calendaring software. Post appointments in Outlook and they will be automatically posted to your calendar. Send customer emails and they are stored in **BluWave crm**.

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 uploaded 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 "Quotes" 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.

Document Management

Upload your Files to the Server

Select your file to Upload: **No file chosen**

Description of your File:

Folder/Subfolder to save on Server:

Uploaded	Folder	Sub Folder	Sales Rep	File Description	File Name			
07/09/2011	Brochures		Denzil Govender	Procedures	Stored Procedure Update Queries.docx	Dload	View	Del
07/09/2011	Brochures		Denzil Govender	Trials	ExpiredTrials.xlsx	Dload	View	Del
07/09/2011	Brochures		Denzil Govender	Web Service	Details of Web Service.docx	Dload	View	Del
14/09/2011	Brochures	(None)	Denzil Govender	Applepad	Applepad2.docx	Dload	View	Del
12/09/2011	Presentations	BluWave	Tania	BluWave Presentation	BluWave PRESENTATION Tania.pptx	Dload	View	Del

Mailing List Management (1)

The system has a fully integrated email marketing function. Generate targeted lists; customize your own HTML message with text and graphics or pictures. Use same pre-defined templates to enhance the look of your message. The mail monitor tracks response rates of your marketing messages, numbers of reads, click-throughs etc. In addition the bounces and un-subscribes are automatically updated into your system.

Leads Management

A web service is available for your web developer to post enquiries directly from your web site to a the sales staff in **BluWave crm**. If this is done the uses will see the new leads on their home page at startup time. The leads database stores all new enquiries. They can be imported from lists or your website. Once auctioned by a sales person and qualified they can be automatically transferred to the CRM database for further processing. Use this database for outbound canvassing to process leads prior to sales qualification.

Integration with Pastel Sales Invoice History (2)

In order to effectively manage the sales team an analysis of sales activity against sales results is essential. **BluWave crm** has an interface to your financials allowing you to upload invoice history per customer and sales person.

Notes:

- (1) This feature to be added in Oct 2011.
- (2) These features to be available later.

BluWave CRM on Demand Software - Technical Fact Sheet



Locally Hosted

BluWave Software provides a locally hosted cloud CRM application. The program and data are hosted by Afrihost using the Internet Solutions infrastructure in Johannesburg. Physical access to the dedicated server is very secure. Only designated BluWave staff may access our server. Also provided are redundant power, fire suppression and excellent physical security. The server is of the latest rack-mounted type with Xeon processors. Raid drives are used so this redundancy means should the disk drive fail; there will be an automatic switch over to the second mirrored drive.



System Architecture

Development languages used are C#, Visual Studio, ASP.net 3.5, Dev Express and Ajax. The database used is SQL Server 2008. There is a 3 tier architecture. The system is structured as a single instance, multi-tenant application. Backups are done twice a day, and once a day offsite to another physical location.



Security

Secure user login and encrypted password for each user. The password can be changed by the user if so desired. All data moving between the Web App and the database and vice versa are encrypted using https protocol. All passwords are stored in cryptic (encrypted?) format.



Robust Internet Connection

Unlike other vendors our data centre is local and provides extremely fast connection speeds. The network is fast and reliable. There is a guaranteed 99% uptime. The server is hosted on Internet Solution's backbone at the hub of South Arica's online community, with redundant links to the internet.



Hardware

You can run the application from a browser on either a Windows based PC or an Apple Mac PC or any Tablet device such as the iPads. Later support is to be provided for a cell phone (Mobi) interface.



Local Support Service

Technical support is proved between 8am and 5pm. Our friendly, competent support staff are available to ensure you receive the service you expect.