



BluWave CRM- Cycles & Routes



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1. Introduction

The **BluWave CRM** Cycle Planner feature allows all **BluWave CRM** users to create recurring activities, for e.g. cyclical telephone calls and visits for customers and prospects. In addition, the cycles can be planned using routes and areas to minimise the salesperson's travel time across their territory.

For instance, a salesperson may want a call cycle that reminds them to visit or call on a specific customer every first Monday of the month or every Wednesday fortnightly. Once you have setup these cycles, the **BluWave CRM** will automatically create these activities for you in the frequencies that you have chosen.

Any salesperson with the **User** role can only create cycles for their customers but **Manager** roles can create cycles for all clients falling in their branch. While the **Executive** role allows one to create cycles for clients across the branches.

2. Setting up Cycles and Routes

To setup Cycles and Routes and to use the Cycle Planner, we recommend that you follow the below steps:

- Define Areas and Routes.
- Assign clients to specific Areas and Type.
- Plan your Cyclical Calls and Visits.
- Add the Cycles to BluWave.

2.1 Define Areas and Routes

Areas: These are suburbs or towns in which your company operates.

Routes: Areas are grouped into Routes. Routes are then the regions the salesperson will go to on a specific day of the week.

The system uses these routes to allow you to plan and see cycles for all customers falling in the same geographical region.

Should you not want to create routes, you assign all your areas to one route.

Click on the **System Setup** tab, and in the dropdown select the **Routes** option.

Home | **Activities** | Leads | Contacts | Companies | Opportunities | Reports | **System Setup** | Financials | List Manager

CRM Setup | Administer Users | Edit Profile | Imports | Quote Setup | Pricelist Management | Documents | Volume Pricing | Workflow |

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Calendar

April 2020

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Last Invoice Date:

CRM Setup

Select Dropdown List to Edit: **Routes**

Code	Description
Edit Delete CT	Cape Town
Edit Delete DRB	Durban
Edit Delete JHB	Johannesburg
Edit Delete PTA	Pretoria

Add a new Route

Route Code: Route Description:

After adding in the **Routes**, select the **Areas** option in the dropdown field.

Edit or Add in the different **Areas** and assign each to a **Route** by selecting the route from the dropdown field.

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27	28	29	30	1	2	3
4	5	6	7	8	9	10

Last Invoice Date:

CRM Setup

Select Dropdown List to Edit: **Areas**

Code	Description	Route
Edit Delete CTCC	CT City Centre	Cape Town
Edit Delete CTE	CT Eastern Suburbs	Cape Town
Edit Delete CTN	CT Northern Suburbs	Cape Town
Edit Delete CTS	CT Southern Suburbs	Cape Town
Edit Delete CTW	CT Western Suburbs	Cape Town
Edit Delete DBNCC	Durban City Centre	Durban
Edit Delete DBNNC	Durban North Coast	Durban
Edit Delete DBNPT	Durban Pinetown	Durban

Add a new Area

Area Code: Area Description: Route:

2.2 Assign Client to Specific Areas and Types

The Prospects and Customers should be assigned to an Area as well as a Type. This will enable you to view Cyclical activities for specific Types of clients in each Area.

Remember to click on the **Update** button after updating the company details.

2.3 Plan your Cyclical Calls and Visits

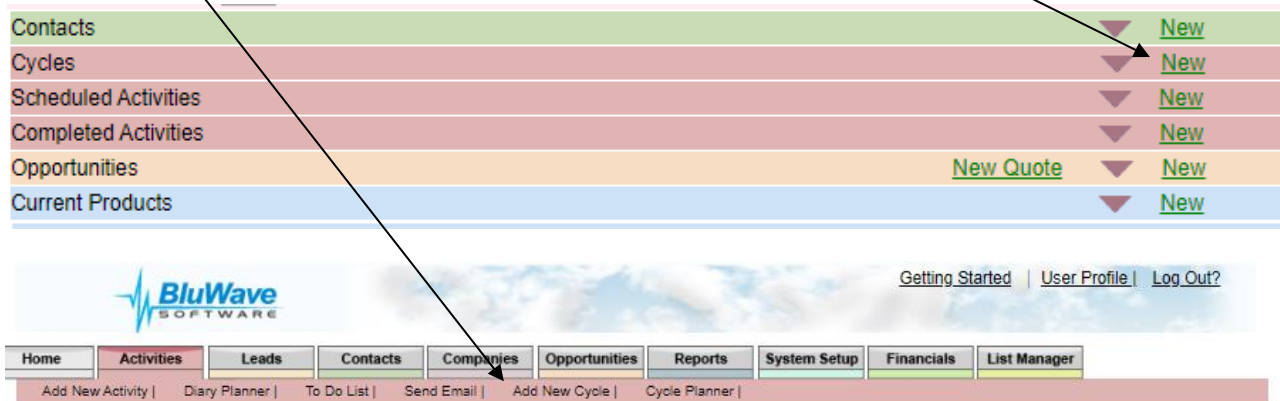
To ensure that all clients in a calling plan are covered, it is best to segment the clients into different types and assign different call cycles respectively on paper before entering this onto the system.

A typical calling plan would entail calculating the normal working hours in a year for a salesperson that excludes weekends, leave days, public holidays etc. One would then classify which clients need to be seen or called on in a given time period and in which frequency bearing in mind the geographical location of the clients.

Once this plan been devised on paper, then the sales rep can set the recurring activities in **BluWave CRM**.

2.4 Adding a Cycle

A cycle can be created by using the **Quick Create** dropdown; the **Cycle** panel on the **Edit Company** page; or the **Add New Cycle** sub tab under the **Activities** tab.



On the **Add Cycle** page the user would have the ability to either create a recurring task or a recurring appointment.

The 'Add Cycle' form is displayed on a light pink background. It features a header with a clock icon, the title 'Add Cycle', and three buttons: 'Save', 'Save & New', and 'Cancel'. Below the header is a section titled 'Service Cycles' containing several input fields: 'Sales Staff' (dropdown menu with 'Michelle Snyders'), 'Company' (text input with 'BluWave Software' and a magnifying glass icon), 'Contact' (dropdown menu with 'Peter Burger'), and 'Activity' (dropdown menu). Below these fields are 'Start Date' (dropdown menu with '11/02/2020') and 'Duration' (input field with '1' and 'Minutes'). The 'Recurrence' section has radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly', and options for 'Every 1 day(s)' and 'Every weekday'. The 'Recurrence End' section has radio buttons for 'No end date', 'End after: 1 occurrences', and 'End by: 11/02/2020'. At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

Step 1: Select the **Company** (using the magnifying glass) and the correct Contact person (from the dropdown).

Step 2: Select the recurring **Activity**.

Step 3: Decide whether this cycle should be a **task** or an **appointment**.

- For a Task only the Start Date would need to be populated (usually defaulted to today).
- For an Appointment the Start Date, Time and Duration of the Appointment would also need to be populated. (These appointments will not pull through to your outlook calendar).

Step 4: Select the relevant Recurrence settings.

2.4.1.1 Recurrence Options

Daily

Daily
 Weekly
 Monthly
 Yearly

Every day(s)
 Every weekday

This will create a daily activity that will appear in your diary planner as often as you have selected it to occur.

Weekly

Daily
 Weekly
 Monthly
 Yearly

Recur every week(s) on:
 Mon Tue Wed Thu
 Fri Sat Sun

Select the days you want the activity to recur in a week and how often you want this reminder. (e.g. every 2 weeks). Multiple days can be selected.

Monthly

Daily
 Weekly
 Monthly
 Yearly

Day of every month(s)
 The of every month(s)

For monthly cycles, indicate which date/or day of the month you want so set the recurring activity for, as well as the monthly interval.

Yearly

Daily
 Weekly
 Monthly
 Yearly

Every
 The of of

For yearly cycles, indicate the date/day and month the selected activity will recur.

Step 5: Select when the Recurrence should end.

No end date
 End after: occurrences
 End by:

Set when you want the recurring activity to end. You can either set the activity to never end; set it to end after a particular number of occurrences; or set the specific date you want the activity to end.

Step 6: Click on the **Save** button to save this cycle.

2.4.2 Viewing/ Editing a Cycle

Once the Cycle has been saved and added to the system, that Cycle can then be found on the **Edit Company** page as well as on the **Diary Planner** page and the **To Do List** page.

2.4.2.1 From the Edit Company Page

From the **Edit Company** Page, the user would be able to view the Cycle created, by expanding the **Cycles** panel.

	Edit	Overdue	Next Date	Activity	Sales Rep	Contact	Note
Delete			11/02/2020	Printer Check	Michelle Snyders	Lily Hello	Printer Check

To **Edit** the Cycle (the series), the user would click on the blue icon on the left of the cycle. This will direct the user to the **Edit Cycle** page, where the user can make the necessary changes (i.e. the recurrences or activity description).

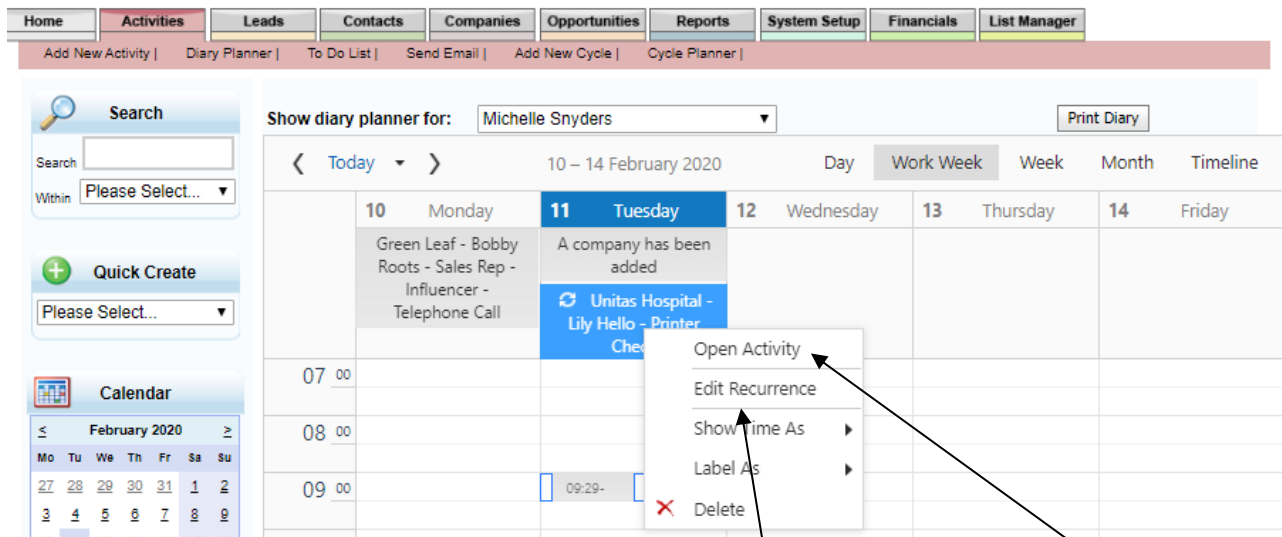
To Complete the Recurrence activity (one occurrence of the cycle), the user would click on the **Date** link in either the **Next Date** Column or the **Overdue** Column.

This will direct the user to the **Add Activity** page to add in their feedback or notes on the activity, and then click on the **Save** button to save the information to the system.

That activity will then appear in either the **Scheduled Activities** panel (if the user didn't complete the activity) or in the **Completed Activities** panel (if the user completed the activity) on the **Edit Company** page.

2.4.3.1 From the Diary Planner

The Cycles created will appear on the **Diary Planner** in either the Task section or the Appointment section, depending on their settings. All cycles will be displayed in Blue.



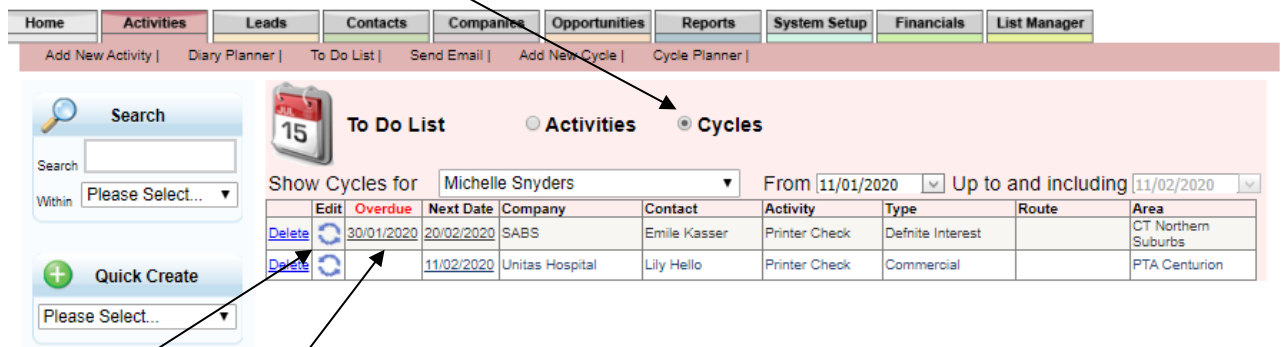
To **Edit** the Cycle (the series), the user would click on the **Edit Recurrence** menu option.

To Complete the Recurrence activity (thus one occurrence of the cycle), the user would click on the **Open Activity** menu option.

2.4.3.2 From the To Do List

From the **To Do List** page, the user would be able to see all the cycles that have an occurrence due.

On the **To Do List** page, click on the **Cycles** radio button to change the view of the **To Do List** page.



To **Edit** the Cycle (the series), the user would click on the blue icon on the left of the cycle. This will direct the user to the **Edit Cycle** page, where the user can make the necessary changes (i.e. the recurrences or activity description).

To Complete the recurrence activity (one occurrence of the cycle), the user would click on the **Date** link in either the **Next Date** Column or the **Overdue** Column.

This will direct the user to the **Add Activity** page to add in their feedback or notes on the activity, and then click on the **Save** button to save the information to the system.

2.4.4 Completing the Cycle Activity

In order to complete an activity, the user would open/ edit an activity (as shown on the previous pages).

Once on the **Edit Activity** page, the user would make sure to type in their feedback on the activity (also known as a call report); that the **Complete** checkbox is ticked and then click on the **Update** button.

If a user edits an activity where the activity date (for tasks) and time (for appointments) is in the past, the system automatically checks the completed check box; this makes it easier for users to complete activities.

If however you edit an activity because the time or date of the appointment has changed and thus you change the date or time to a future date, the system will uncheck the complete check box.

If you are logging and completing an activity that happened in the past, but was not initially entered to the system, BluWave CRM will note that the activity's date and/or time is in the past and will once again auto complete it. It will also indicate that you are entering an activity that occurred in the past.

If an activity is changed to a task, the invite customer checkbox is unchecked.

Activities dated in the future will not be completed.

The **Update & New** button allows the user to complete the current activity and then book a new activity on that same company (essentially a Follow up activity).

3. The Cycle Planner

The cycle planner allows the user to view all clients with cyclical activities by route for each salesperson. Scroll through the plan week by week to see if all the calls are aligned by route and adjust if necessary, so as to minimise the salesperson’s travel time across his territory.

Right click on a recurrence to edit the associated settings.

4. View Cycles

From the **Companies** tab, click on the **View Cycles** sub tab.

This allows the user to search for clients (prospects and customers) that have cycles by Type, Area and Route.

The clients that have cycles booked toward them, will have the checkbox on the right ticked.

Home | **Activities** | Leads | Contacts | **Companies** | Opportunities | Reports | System Setup | Financials | List Manager

Add Company | View Companies | Contract Pricing | Group Pricing | **View Cycles** | Price List | Generate Jobs | Assign Jobs | Post Collection | Monthly Billing |

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Quick Create

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Last Invoice Date:

View Cycles

Branch : **Johannesburg** Sales Staff : **Michelle Snyders** Customer Prospect

Route : * Area : * Type : *

Client : *

Company Name	AccNo	Route	Area	Type	Cycle?
Edit <u>BluWave Software</u>	2346	Johannesburg	JHB Northern Suburbs	Residential	<input checked="" type="checkbox"/>
Edit <u>Chet</u>					<input type="checkbox"/>
Edit <u>Imperial Logistics</u>		Cape Town	CT Southern Suburbs	Residential	<input type="checkbox"/>
Edit <u>Unitas Hospital</u>		Pretoria	PTA Centurion	Commercial	<input type="checkbox"/>

5. Appendix

5.1 Route Report



System Routes Report

Date Report Created : 09 April 2020

Route: (Unknown)

Area Code	Area Description
xxxxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxx

No of Areas in Route: 1 (Unknown)

Route: Cape Town

Area Code	Area Description
CTCC	CT City Centre
CTE	CT Eastern Suburbs
CTN	CT Northern Suburbs
CTS	CT Southern Suburbs
CTW	CT Western Suburbs

No of Areas in Route: 5 Cape Town

Route: Durban

Area Code	Area Description
DBNCC	Durban City Centre
DBNNC	Durban North Coast
DBNPT	Durban Pinetown
DBNSC	Durban South Coast

No of Areas in Route: 4 Durban

Route: Johannesburg

Area Code	Area Description
JHBC	JHB City Centre
JHBE	JHB Eastern Suburbs
JHBMR	JHB Midrand
JHB Mi	JHB Midrand
JHBN	JHB Northern Suburbs
JHBSE	JHB South-Eastern
JHBS	JHB Southern Suburbs
JHBW	JHB Western Suburbs

No of Areas in Route: 8 Johannesburg

Route: Pretoria

Area Code	Area Description
PTAC	PTA Centurion
PTACC	PTA City Centre
PTAE	PTA Eastern Suburbs
PTAN	PTA Northern Suburbs
PTAS	PTA Southern Suburbs
PTAW	PTA Western Suburbs

No of Areas in Route: 6 Pretoria