BluWave CRM System Setup Manual

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1 Introduction

This manual is designed to assist you in the configuration of your BluWave CRM system. This is achieved through the use of the **System Setup** Tab.

In order for your system to be used in a live environment, and to ensure that the system implementation, training and user adoption is effective, the following are the areas that would need to be configured.

Please research your existing manual or automated systems so as to define all the types of data required to be gathered about customers and prospects.

During the setup process you will be required to add codes and description. **Please ensure that codes are unique and not changed or deleted once it is in use.**

Keep in mind that, if codes are changed or deleted, the history of the system as well as other areas of set up settings will be affected by this change.

2 Branches

NB! You will need to add these first before adding your users, under the Administer Users sub-tab under the System Setup Tab.

Edit branches by selecting the branches option from the dropdown list of set up items on the **System Setup** Tab. Use the branches option to define the branches that your sales team is assigned to in your organisation.

Branches are also used when distinct quote templates would be used.

Branch codes would not be editable, and would also be undeletable if there are users assigned to that branch.

3 Administer Users

Use this sub-tab option under the **System Setup** tab to add the names of all sales staff and other users whom will be using *BluWave* **CRM.** Using the radio buttons at the top, the active users and inactive users can be seen and edited.

In order to edit any settings relating to a user (ie making them an active or inactive user), click on the **Edit** link on the left of their names. See heading number 6 (Editing a User's Profile/ Change Password- page 8) on what setting can be changed on each user's profile.

4 Adding new Users to BluWave CRM:

Click on the **System Setup** Tab.
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 the **New User** button at the top of the screen. This will allow you to enter the new user's details to create their account on *BluWave CRM* as shown on the next page.

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 (security roles).

Click on the **Save User Details** button to create the account or the **Save& New** button should you wish to create an additional account. The user will then receive an email with their login credentials (They will still receive an email if they are inactive users, they would however not be able to login as inactive users).

5 Security Roles

Define the security roles of each User.
(See Security Model at the end of this document)

7 Editing a User's 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 "**User Profile**" link on the top right of the page.

7.1 Activate or De-activate a user

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. Licenses aren't linked to a specific person, but rather to the amount of active users allowed on the System.

7.2 User Details

The user details should be filled in, keeping in mind that these details will appear on the quote if the user creates and sends quotes to clients.

7.3 Change Password

To change the users BluWave Login password, Click on the **Change Password Button**. To extra fields will appear where the new password should be typed in both fields. Click on the **Update Details button** at the bottom of the page before proceeding.

7.4 Inserting an Email Signature

In order to add an email signature to the system, that will then appear in the relevant email sent from the system, click on the **HTML Signature button**. There is a separate document outlining the steps to add in the email signature.

7.5 Various Monthly Targets

Indicates the monthly revenue target set for the sales representative is used to measure the following:

- **Number of quotes** – Indicates the number of quotes the sales representative needs to issue for the month.
- **Target Quoted Value** – Indicates the value to be quoted for the month.
- **Target Sales Value** – Indicates the value of sales to be made for the month. This value will display on their dashboard to measure against their actual sales.
- **GP Value** – Indicates the gross profit value that needs to be achieved for the month.
- **Number of Units** – Indicates the number of units that needs to be sold for the month.
- **Number of Face-to-Face Visits** – Indicates the number of face-to-face appointments the sales representative need to complete during the month.

7.6 Start and End GIS Location

The **Use Current Location and Select from Map buttons** allow the users to set their starting location on the system. The starting location will be used when calculating travel claim reports and location tracking reports. This works hand in hand with the **Track Geo location of Activities? Checkbox**.
Rate per Km, if populated would be used to calculate the monetary value associated with the amount of kilometres driven out per month on the Travel Claim Report.

7.7 Rep Code

This rep code is used by the system to associate records with the user when importing sales, quotes and customers into the system, either from the manual import format or from the automated daily upload installed for your accounting solution.

7.8 Approval Manager

This field specifies which managers (with approval rights) need to approve the quotes done by the user.

7.9 Additional Settings (Checkboxes)

If they are ticked, the setting would apply.

Do you want to copy your active opportunities to the current month?	This setting keeps the opportunities that have not been closed by the expected order date, visible on the pipeline.
Do all Quotes from this user Require Approval?	By checking this checkbox all quotes done by the user will have to go through the approval process before the quote can be sent to the client.
Track Geo Location of Activities?	This tells the system whether or not to geo-locate where activities have been completed by the user.
Default New Activity Company to the nearest Company based on Geo location?	This setting tries to assist the user when creating new appointments, either via quick create or the diary planner. The system will try to find the users current location (address) in the company database, and bring up the company details closest to the user's location.
Do you want BluWave CRM to book appointments into your email calendar?	This will allow the system to push through the appointments created in BluWave to your Email Provider, i.e. Outlook, so that notifications can be pushed through.

7.10 Email Settings

In order for the system to send emails and push through appointments to the email calendar, the email settings would need to be appropriately populated.

*Please also make sure to always update this password if the email password is changed.

We have made provision for the Following email client settings-

1. Pop3 & Imap
2. Gmail
3. Exchange & Office 365

In the user profile, please make sure to choose the correct email client you are using and fill in the settings accordingly:

7.10.1 Pop3 & Imap

Regarding IMAP
In **some** instances, some IMAP Servers may function with the IMAP server captured in the SMTP server under POP3 or Exchange Server.
Please make sure that the correct settings for SSL and the SMTP port is completed.

7.10.2 Gmail

The port will always be 857 and the SSL need to be ticked.

7.10.3 Exchange & Office 365

For Office 365 Users-
You are able to use the below web service address:
https://outlook.office365.com/EWS/Exchange.asmx

7.11 Settings only System Admin can change

- **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 logins for users who have left the company.
- **Monthly Target**- Indicates the monthly revenue target set for the sales representative
- **Exchange Settings**- adding/ editing the web service address for the exchange server details

8 Customer & Prospect Types

These are used to categorise your prospects and customers. Customers can be "typed" by their value or potential value.

This helps when deciding what amount of effort the client would be worth.
For example in levels of the potential revenue or actual revenue the client could accrue per annum.

9 Opportunity Statuses (Sales Path)

Develop a list of the steps that an opportunity moves through from first contact through to completed sale. Note that each status has to be categorised as either **A** – Active, **S** – Sold, **X** – Lost or **Y** – Decided Not to Buy.

These states are used by the system to indicate if the opportunity is active, lost or sold.

A typical set of opportunity statuses could be as follows:

CRM Setup

Select Dropdown List to Edit: Opportunity Statuses ▼

	Seq.#	Code	Description	State
Edit Delete	10	ENQ	Enquiry	A
Edit Delete	20	FD	First Demonstration	A
Edit Delete	30	QS	Quote Stage	A
Edit Delete	40	NEG	Negotiation	A
Edit Delete	50	VO	Verbal Order	A
Edit Delete	60	S	Sold	S
Edit Delete	70	LO	Lost	X
Edit Delete	80	DNB	Decided Not to Buy	Y

Add a new Opportunity Status

Status Code: [   ]   Status Description: [   ]

State: [A ▼]   Sequence No: [   ]

[Save]

Keep in mind to phrase the status in a way that would make sense when viewing the opportunities.

Views : ● Active   ○ Sold   ○ Lost

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Create Filter

		Company	Opportunity Name	Sales Staff	Pot. Value	Quote No	Exp	Status	Age	Logged	Prob. %	GP
Edit	Del	Adams&Adams		Michelle Snyders	585	1090	30/09/2019	First Demonstration	124	09/05/2019	0	235.5
Edit	Del	BluWave Software		Thobanjalo Shangase	0	1087	30/09/2019	Quote Stage	130	03/05/2019	0	0
Edit	Del	Testing Workflows	Testing Workflow	Michelle Snyders	0	1088	30/09/2019	Quote Stage	130	03/05/2019	0	0
Edit	Del	BluWave Software	testing cover letter	Michelle Snyders	375	1086	30/09/2019	Quote Stage	133	30/04/2019	0	175.5

10Activities

		Code	Description	Dur.	F/T/C/I/O		Headings	Invite?	Billable?
Edit	Delete	ER	2 Email Received	0	I	...		☐	☐
Edit	Delete	ACV	Arrange Cust Visit	0	T	...		☐	☐
Edit	Delete	BT	Book Training		T			☐	☐
Edit	Delete	BFU	Brochure Follow up		T			☐	☐
Edit	Delete	CFD	Call for Demo		T			☐	☐
Edit	Delete	CFO	Call for Order		T			☐	☐
Edit	Delete	CT	Cartridge Deliver/Change	0	F	...		☐	☐
Edit	Delete	CC	Cold Call		T			☐	☐

1 2 3 4

Add a new Activity

Activity Code: [____]

Headings: [_____]

Activity Description: [_____]

Invite (Default On/Off)?: ☐

Duration(min): [____]

F/T/C/I/O
F=Face-to-Face (Gets Geolocated)
T=Telephonic
C=Correspondence
I=Incoming Email
O=Outgoing Email

[T]

[Save]

Each Activity has a 3 character code as well as a 20 character description.
Define all the activities sales and support staff performs in order to secure a sale and service customers for e.g.: "Follow up on proposal" or "Fax brochure".
These should correspond to the sales path. For example, if one of the statuses is "Demonstration", then one of your activities would be "Demonstration".

The activities should be as descriptive as possible and should relate to the sales process as described in the Sales Path. If you use descriptive activities it helps everyone to know exactly what is scheduled or was done at a customer.

Internal company activities (like: Leave, Public Holidays and Admin in Office) can be booked in the user's diary, but the activities would need to be listed.

The Activity list would need to be extensive enough to satisfy the different tasks management expects from the users. For example, if the user needs to hand in a report on a specific date, the activity "Hand in Reports" need to be created, so that the user would be able to setup reminders to do this task.
Other Examples of this kind of tasks could be: Hand in Reports, Sales Meetings, Training, Send Documentation to Client, Follow up on Documentation Sent.

10.1 Description

The activity description is used by the user in the system, but the activity code is stored by the system so once the code is in use it should not be changed or it will affect the activity history.

The activity description however can be changed if required. For Example you may wish to change a description called First Demo to First Consultation because it better suits your sales process. This would mean that the activity history would show as First consultation assuming you keep the code the same and just change the description.

10.2 F/ T/ C/ I/ O - categories

Each activity would also be categorised by the type of interaction that would be involved in the activity.

- F- Face to Face (Activities that usually involve physically meeting with the contacts person or other parties invited, i.e. Customer Visit)
- T- Telephonic (Activities that can be done by phoning the contact person, i.e. Follow up on Quote)
- C- Correspondence (Activities that would involve sending documents, i.e. send quote)
- I- Incoming Email (Used by our system default activity called Email Received, could be used when the activity would be to send an email to the contact)
- O- Outgoing Email (Used by our system default activity called Email Sent, could be used when the activity would be to receive an email to the contact)??

10.3 Headings

Headings can be used to prompt for specific feedback from the user related to that activity. It would display this in the note section of the activity for the user to see and add to. For example, if the discussion points and actions points need to be listed or if specific questions need to be answered. Note that if the activity is saved as an appointment the information in the notes section will be sent to the client in the meeting request.

11 Leads Statuses

Applies to Leads only. Leads can be imported from a marketing database list or from your web enquiries. Develop below a list of the steps that a typical lead moves through from first contact through to qualified prospect stage.

12 Company States

The state field is also used for customers to indicate their current status e.g. New Customer, Valued Customer, Recommender, Archived/Inactive Customer, Account on Hold etc. Prospects have a different list of "states" (opportunity statuses- as the prospect would need to follow these steps to become a customer).

13 Sources

Develop a list of sources where the information was gathered on prospects/customers. Specify each advertisement or media; cold calling; referrals - from customers, personal, from prospects; exhibitions, direct mail promotions (specify only those currently in use).

14 Industry Sector

Use this field to specify the industry sector that the prospect or customer company operates in. Try to keep the industry sectors to as few as possible to make it easier for you to target your direct marketing. If there are too many industries it makes it difficult to generate mailing lists.

15 Area

This field is used to indicate the geographical location the prospect or customer is in. This is useful for the user for planning his call cycles if regular visits to customers are required. Define suitable areas and describe to the sales team what these are. Areas should then be allocated to a "Route" for cyclical calling.

15.1 Routes

Create Routes that group the areas above into broader geographical regions. E.g. Areas like Randburg, Sandton, and Fourways can all be grouped into the route JHB North. This will assist the sales people in managing their territories. This is also required for cyclical calling.

16 Payment Terms

Add in the different payment terms that could be applicable to a customer. I.e. COD, 30 Days, 60 Days.

17 Company Groups

Company groups are used to link different companies that are added to the system, together. This is especially helpful if you have different branches or divisions added as companies (i.e. FNB- PTA & FNB- JHB) and those companies all fall under the same holding company (i.e. FNB/RMB).
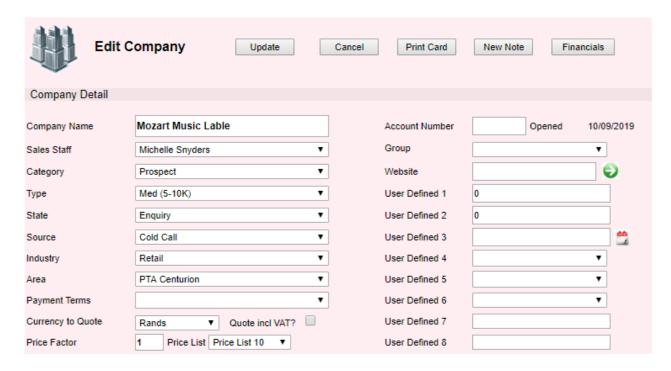
18 User-Defined Fields Client Data Items

User-Defined Fields are extra fields that can be utilized to add other import data to the system and can also be customized to the user's requirements. These fields allows the user to categorise and segment the company database, qualify prospects and can be used to generate mail lists and trigger workflows.
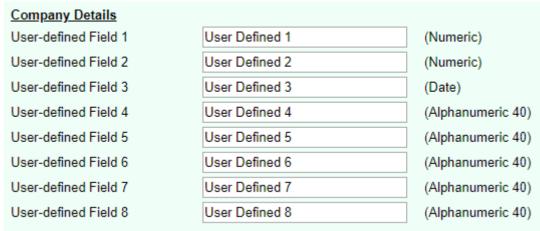
18.1 Company Screen

On the Company Screen there are 8 user defined fields that the user can customize to their requirements.

- **User Defined Field 1 & 2** – only numeric values will be accepted
- **User Defined Field 3** – only a date value will be accepted (there is a little calendar icon to assist in adding the date value)
- **User Defined Field 4, 5 & 6** – these are dropdown fields that can be populated, and the users could make a selection from those entries
- **User Defined Field 7 & 8** – a short sentence or keyword can be put in here, that can contain both numeric and alphabetical characters

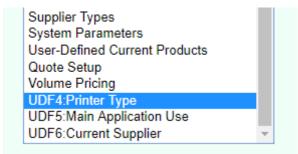A Screenshot of where these fields would be found in BluWave CRM.

These fields can be renamed in the **System Setup** Tab, by selecting **System Parameters** in the dropdown field.

Once these changes are saved, the labels on the company page will be changed to what is entered her.
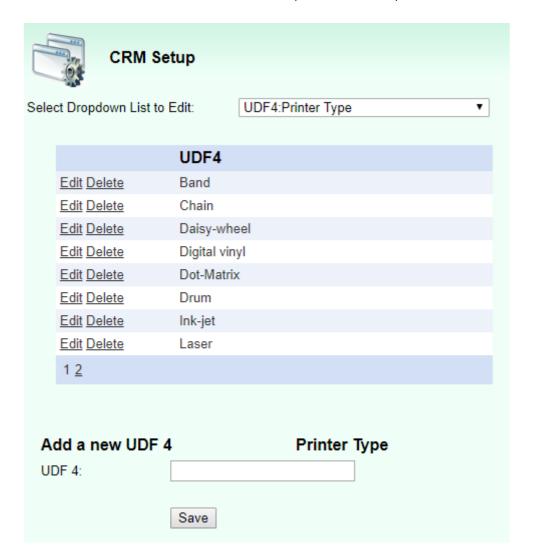
After the fields have been named, the dropdown fields should then be populated as to give the users the options to choose from.

In the CRM Setup dropdown, scroll to the bottom and there you will find the 3 UDF fields with the names entered previously.

Choose which field to populate.

And use the bottom fields to add in the different options to the dropdown. No codes are needed.
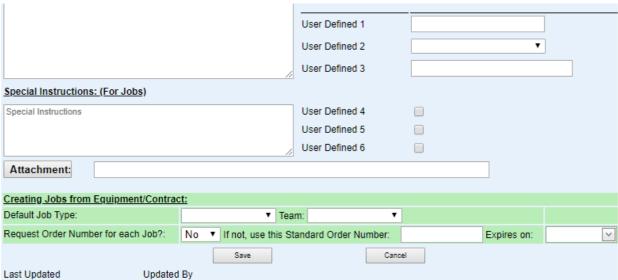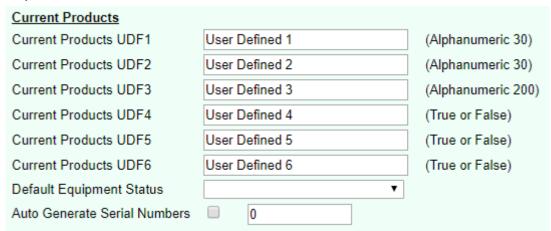

18.2 Current Products Screen

On the Current Products Screen there are 6 user defined fields that the user can customize to their requirements.

- **User Defined Field 1** – a short sentence or keyword can be put in here, that can contain both numeric and alphabetical characters
- **User Defined Field 2** – this is a dropdown field that can be populated, and the users could make a selection from those entries
- **User Defined Field 3** – can also be used to type in both numeric and alphabetical characters.
- **User Defined Field 4, 5 & 6** – are checkboxes that can be ticked or unticked to indicate true/ false values (i.e. yes or no answers)

A Screenshot, of the bottom portion of the Current Product Screen, where the User Defined Fields would be found.
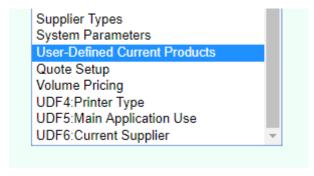

These fields can be renamed in the **System Setup** Tab, by selecting **System Parameters** in the dropdown field.
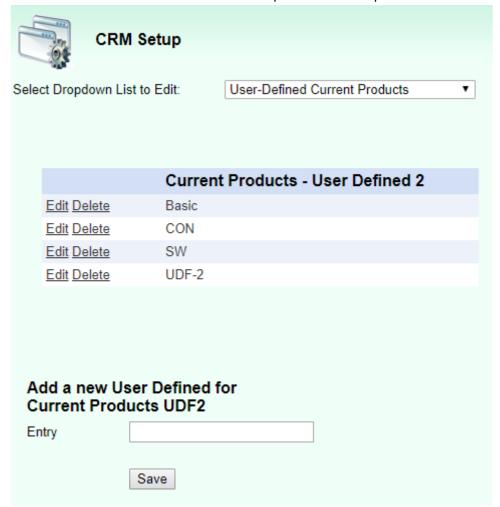

Once these changes are saved, the labels on the company page will be changed to what is entered her.

After the fields have been named, the dropdown fields should then be populated as to give the users the options to choose from.
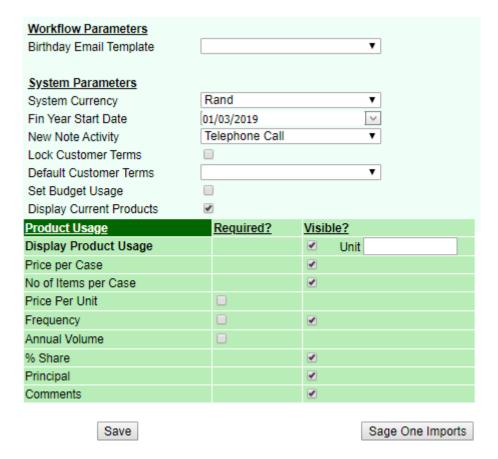
In the CRM Setup dropdown, scroll to the bottom and there you will find the option User-Defined Current products.

And use the bottom field to add in the different options to the dropdown. No codes are needed.

19 System Parameters

System Parameters allow the user to default some settings for the system.

19.1 Birthday Email Template

Choose an email template (that is already added in Email Templates- see heading 26) that will be sent to the clients on their birthday, if the checkbox next to their birthday is ticked on the Contacts screen.

19.2 System Currency

This sets the default currency the system should use to the selection made from the dropdown.

19.3 Financial Year Start Date

This informs the system when this date is. The information would be used for integrating to an accounting package (imports). It would also be used for Financial Reports.

19.4 New Note Activity

This will populate the type of activity that the new note activity should create. It allows the user to easily log information (Unexpected Communication/ Notes) regarding the client.

19.5 Lock Customer Terms

Payment terms on the Edit Company screen would by editable by the rep or on the quote.

19.6 Default Customer Terms

Set the default payment term that should be populated when creating a new company.

19.7 Set Budget Usage

For Current Products- this would be used to calculate monthly budget based on their current payments.

19.8 Display Current Products

This determines whether the Current Products panel should be visible on the Edit Company screen.

19.9 Product Usage

This would be used when wanting to track volume usage of products when the client orders, either based on figures or percentages, as well as when they order either from you or your competitor. This would be most useful for the merchandising industry.

20 Contact Categories

This field is your first/primary contact profiling field.

Think about how you need to classify your contact people and decide if you need to categorise your customer and prospect contact people for a particular purpose.
For example, you can use the terminology described in your sales process for prospects e.g. Sponsor, gatekeeper, decision-maker etc.

For customers you may prefer to categorise people by function e.g. sales, marketing, production, finance, or by level of management e.g. senior, middle, operational or both: senior - sales, middle financial etc.
You may wish to indicate who is a user of your product and flag them with these functions.

NB! This categorizing is quite helpful when wanting to target specific people in a company with a newsletter with specific information relevant to those contacts.

21 Countries

Countries are used in the address portion of the Contacts page. The user would be able to select if the address is in another country.

22 Products

Products are used for opportunities and also by the Quotes Automation function. Products either need to be imported into the Products Table or alternatively loaded to the system individually. The fields that are required are the Product ID, Product Description, Product Group, a Narrative and Selling Price.

22.1 Product Groups

Group the products uploaded here. Each product group can have multiple products under it. These groups can either be imported or entered manually.

22.2 Product Accessories

Products can be associated with each other. For example, if a printer is selected, the paper and cartridge option would appear to easily add those products to the quote as well. So there would be a main product and several other products linked to that main product.

22.3 Product Group Categories

These categories can be used to group different product groups together for the Bluwave BI module. It isn't otherwise used in Bluwave CRM

23 Pricelists

This section allows the renaming of the different pricelists available on the system, if multiple pricelists are imported.

24 Currency

This allows the adding of different currencies that can be used when quoting. Rands would always be set to 1, where as an estimate exchange rate would be allocated to the other currencies. The default currency a company should be quoted in, should be set on the Edit Company screen. The currency of a quote cannot be change on and after Step 2 of the Quoting process; the quote would have to be re-done.

25 Group Contract Pricing

This section allows the creation of specific pricing that should be valid for a certain group of companies for a specific period.
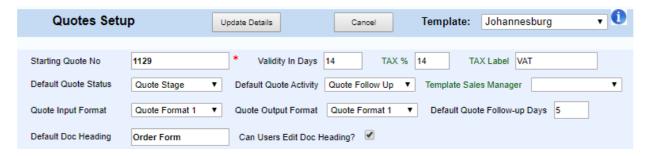
26 Volume Pricing

If certain product prices should go down the more quantities are ordered, this is where the quantities and pricing is saved.

27 Restricted Pricelist

If a user were only allowed to quote using certain pricelists, this is where the different pricelists would be associated with the different users. (The user would need to have the **Restricted Pricelist role** on their profile ticked.)

29 Configuring The Quote Setup Area

To configure the BluWave quoting feature, navigate to the Quote Setup area under the System Setup Tab.
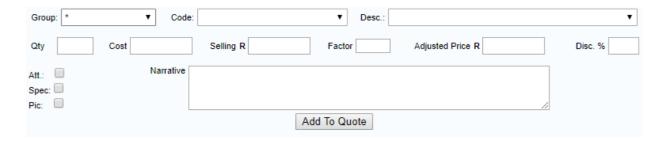

First note that all the labels are either green or black. The labels that are black CANNOT be changed when setting up different templates (the settings will be applicable across all templates/branches). The labels that are in green can be set up per template/branch.

To choose which template to set up, choose the applicable template from the dropdown field at the top right corner.

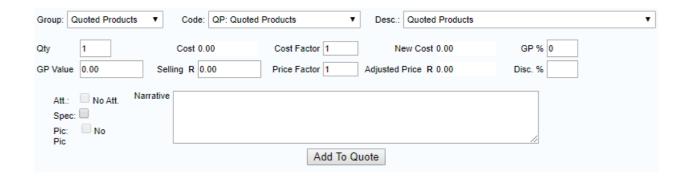## 29.1 Step 1: Decide on which INPUT should be used when quoting.

The system allows for 3 different types of inputting the information per product on the quote.

Quote Input Format 1: Requires a selling price and has a factor or discount.
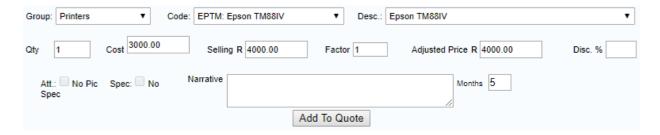

Quote Input Format 2: This input format uses a more complex process for the calculation of a products selling price as follows:

- Enter base cost price in Rands.
- Enter a factor to increase the cost for say transport cost and import duties. This factor can be set up in BluWave as a default per product group. The factor can also be defaulted from the company screen. So if for example a customer should pay 5% percent more as he is further away, the user can add a factor of 1.05 to the customers' company details and it will default on all the their quotes.
- Enter either a GP% or a GP Value to arrive at the selling price.

Group:	Quoted Products ▼	Code:	QP: Quoted Products ▼	Desc.:	Quoted Products ▼

Qty	1	Cost 0.00	Cost Factor 1	New Cost 0.00	GP % 0
GP Value	0.00	Selling R 0.00	Price Factor 1	Adjusted Price R 0.00	Disc. %

Att.: ☐ No Att.
Spec: ☐
Pic: ☐ No Pic

Narrative

[Add To Quote]

Quote Input Format Annuity: This would be used for capital, and rental/annuity that's ongoing. The difference will only show when a product is chosen that is also marked as an annuity product in the system setup. The amount of months can also be entered.

Group:	Printers ▼	Code:	EPTM: Epson TM88IV ▼	Desc.:	Epson TM88IV ▼

Qty	1	Cost 3000.00	Selling R 4000.00	Factor 1	Adjusted Price R 4000.00	Disc. %

Att.: ☐ No Pic   Spec: ☐ No Spec

Narrative   Months 5

[Add To Quote]

29.3 Step 2: Decide on which OUTPUT should be used when quoting.

The system allows for 3 different types of inputting the information per product on the quote.

Quote Output Format 1: Shorter quote. Will display pictures next to each product if attached.
The Sections included are (in order):

- Page Header (Ratio- 1:7)
- Name of Document
- Client Details
- Quote Header Paragraph
- Cover Letter (if setup and inserted)
- Offers
- Terms & Conditions
- Quote Footer Paragraph
- Sales Rep Details

Quote Output Format 2: Longer quote. Will display a picture before the offer of the first quoted product, if attached.
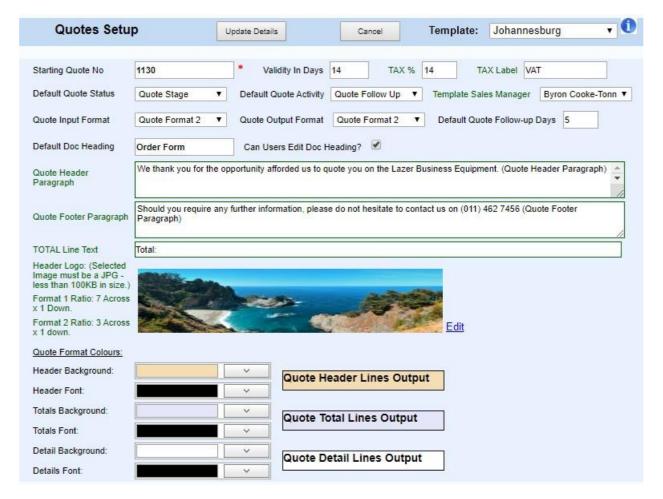The Sections included are (in order):

- Page Header (Ratio- 1:3)
- Client Details
- Quote Header Paragraph
- Cover Letter (if setup and inserted)
- Sales Rep Details (as well as the sales manager details- if set up)
- Offers (On the next page)
- Terms & Conditions (On the next page)
- Quote Footer Paragraph

Quote Output Format Annuity: Has to be selected with Quote Input Format Annuity. Will start like a letter addressed to the client. Each page has an initial space at the bottom.
The Sections included are (in order):

- Page Header (Ratio- 1:3)
- Client Details
- Quote Header Paragraph
- Cover Letter (if setup and inserted)
- Quote Footer Paragraph
- Sales Rep Details
- Offers (On the next page)
- Summary of Proposal (if selected)
- Terms & Conditions

29.4 Step 3: Add in the first Section of Settings

Starting number: indicates what number the first quote generated from the system will be given. Subsequent quotes numbers will be incremented automatically.

Validity: Define how long the quote is valid for here. This will show on the quote header as a default but can be changed on each quotation.

Default Quote Status & Default Quote Activity: Depending on your sales path, define the activity that is created when quotes are generated. The Default Quote activity will allow you to define the activity that needs to happen after the quote has been sent to the client E.G. Quote follow up

Template Sales Manager: Only used on Quote Output Format 2. Shows the managers details next to those of the sales representative.

Default Quote Follow-up Days: Indicates how many days after a quote is sent that the rep must follow up with the client

Default Doc Heading: Indicates what the document heading should be by default, this can be changed on a per quote basis. (only applicable to Quote Output Format 1).
There is also a checkbox indicating whether or not the user should have the ability to change the document heading.

Quote Header Paragraph/ Quote Footer Paragraph: Use this text fields to enter text that will appear on top and bottom of your quote. A good example is shown in the image above.

Header Logo: Upload your company logo/page header here. Click on the Edit link to locate your logo (must be a JPG file less than 100kb) and upload it.
Quote Output Format 1 – needs to be to the ratio of 1:7
Quote Output Format 2 – needs to be to the ratio of 1:3
Quote Output Format Annuity – needs to be to the ratio of 1:3

Quote Format Colours: Set your company's colour to reflect on the different sections of the quote.

29.5 Step 4: Tick and Untick the Middle Section of Settings

This middle section allows you to choose what should be enabled or not. The options differ from the input and output chosen

We'll first show the different options, and then describe each setting.

Quote Input Format **1** with Output Format **1**:

Quote Input Format **1** with Output Format **2**:

Quote Input Format **2** with Output Format **1**:

Quote Input Format 2 with Output Format 2:

Discount/Rebate Section?	☐	Include Product ID?	☐	Show Discount?	☐	Quote Approvals?	☑
Quote Items Search?	☑	Quote Offers Totalled?	☐	Generate Opportunity Numbers?	☑	Display Row Shading?	☑
Force Cost Price Entry?	☐	Insert Product Picture Within Quote?	☑	Default Opp Product to 'Quoted Products'?	☐	Include Product Desc?	☑
Enter own Opp No on Opportunities	☐	Enable Maximum Discount Percentage?	☐	Maximum Discount Percentage on Approvals	0	Show Net Unit Price?	☐
Quote Annuity Items?	☑			2nd Approver?	☐		

Quote Input Format Annuity with Output Format Annuity

Discount/Rebate Section?	☐	Include Product ID?	☐	Show Discount?	☐	Quote Approvals?	☑
Quote Items Search?	☑	Quote Offers Totalled?	☐	Generate Opportunity Numbers?	☑	Display Row Shading?	☑
Force Cost Price Entry?	☐	Insert Product Picture Within Quote?	☑	Default Opp Product to 'Quoted Products'?	☐	Include Product Desc?	☑
Show Row 1 Narrative in Detail?	☐	Sort by Offer No?	☐	Show TAX for each Offer?	☐		
Enter own Opp No on Opportunities	☐	Enable Maximum Discount Percentage?	☐	Maximum Discount Percentage on Approvals	0	Show Net Unit Price?	☐

The Different Settings:

Indicate whether you would like the **Discount/ Rebate section (Custom Quotes);** and **Product ID** to appear on the quote output.

Discount: Should the discount be shown or not.

Quote Approvals: If the selling price is altered on the quote, it will have to be approved before the sales staff can send it to the client. Approval manager is set on each individual's profile.

Quote Items Search: When compiling a quote, the user can search by product code or description.

Quote Offers Totalled: A total for all offers will be displayed at the bottom of the quote.

Generate Opportunity Numbers: This will be generated when a quote is not done in our system, and will allow manual input of values into the pipeline.

Display Row Shading: Alternative lines in the quote will be light grey.

Force Cost Price Entry: Use this option on the quote if the cost price must be included in the quote input. It will not display on the quote output.

Insert Product Picture Within Quote: Pictures can be uploaded to the system, and displayed on the quote.

Default Opportunity Product to Quoted Products: The products displayed on the opportunities/reports will be "quoted products".

Include Product Description: Will determine if the product description will be displayed on the quote or not.

Product Prices include VAT: The VAT will be included in the list price.

Edit Quote Cost Price: Allows the cost price to be edited after a quote is sent.

Exclude Header Shading on Quote: This gives the option to display, or not to display shading in the quote header.

Enter Own Opportunity Number on Opportunities: Only used on custom quotes.

Activate Grid Pricing: This is a pricing matrix, where one client can get multiple prices on various products depending on their category.

Enable Maximum Discount Percentage & Maximum Discount Percentage on Approvals: This sets up to what percentage a rep can give percentage before they would need to follow the quote approval process.

Show Net Unit Price: When quoting, the unit price per item will be shown as well.

Quote Annuity Items: This is mainly for rentals, when income will be distributed over a period of months. This allows the user to enter the information needed to calculate the annuity values.

2nd Approver: This allows the system to redirect the approval process to another manager if the first could be unavailable.

Show row 1 Narrative in Detail: (only applicable to annuity) the narrative of the first product of each offer is displayed at the top of the offer.

Sort by Offer No: (only applicable to annuity) This will sort the offers by number instead of alphabetical order.

Show Tax for Each Offer: (only applicable to annuity) the tax amount for each offer will be displayed.

29.6 Step 5: Add in the settings in last Sections of the Quote Setup

Mandatory Fields:
- Payment Terms: These must be selected before the quote can be previewed.

- Quote Template: If there are multiple quote templates, this ensures that the correct one is selected.
- Delivery: The delivery field must be populated before the quote can be previewed.

Targets: Set the monthly unit sales target and quotes to issue per month target.

Discount line 1 & 2: Indicates what text will be displayed to show the discount per item quoted as well as the total discount on the quote. These two lines will only appear if the Product discount section is turned on.

Page Footer Text or Logo: at the bottom of the quote page you can insert some text – e.g. your Directors names.
If you have some product logos that display in the footer then you can upload an image that would be displayed in the page footer instead of the footer text. (Ratio- 1:7)
By default, the page footer always shows the current date and the page number.

29.7 Step 6: Setup Additional Settings in the Button Section

The buttons at the bottom of the page allows for additional setting to be set up.

Standard Terms: Set up the standard terms and conditions used in your quotes here. These will appear in all generated quotes.

> **Key Words for terms & conditions:** Each term can only have ONE keyword.
> For additional keyword, add in additional terms:
> > **{Delivery}** - Delivery terms, e.g. 2 weeks ex stock.
> > **{ROE}** - Rate of Exchange that can be quoted in the terms. E.g. R13=$1. If the quote is in Rands.
> > **{QuotedROE}** - The ROE this quote is quoted in if not in RANDS.
> > **{PaymentTerm}** - Terms of Payment. E.g. 30 Days.
> > **{Currency}** - The Current the quote is created in e.g. Dollars.

Optional Quote Terms: Set up the optional terms and conditions used in your quotes here. This can then be selected as you create quotes. Could be seen as extra clauses that can be added in on a as needed basis.

Rate of Exchange: Enter a list of the various rates of exchanges here to be selected when creating quotes should you be quoting on products that may be affected by fluctuations of other currencies

BCC Recipients: Allows you to add specific people who will be always Bcc'd on all sent quotes by a particular sales rep.

Multiple Quote Terms: Allows you to add in different terms and condition sets for various scenarios.

Email Text: Enter the email text will be used when sending out the quote from BluWave CRM
The key word {Contact} must be used for the system to pick up the contact's name.

Option Defaults: This will default the headings of the various offers on a quote.

Subject Lines: This section is still in development. Please ignore.

30Reasons Lost

If a sale is lost/ decided not to buy, the system will ask for a reason lost. Enter a list of the common reasons e.g. product features, delivery period, price too high etc. (Opportunities can be closed without a reason)

31Competitor Names

For lost sales, the system will also ask whom it was lost to; enter here a list of the options.
Reasons Lost and Competitor Names are quite helpful to management when having to investigate why deals have been lost and who the biggest competition is.

32Agreement Types

This would be the different types of agreements or contractual obligations that are offered to clients over a certain period. i.e. 12 Month Contract, 24 Month Contract, Rental Agreement, SLA, or Maintenance Agreement.

33Document Management

In order for documents to be added to Activities, Opportunities or Emails the system would need access to those documents. The only way for Bluwave to have access to these documents are if they are uploaded to our secure server.

This feature not only allows the user to associate the correct documentation with records on the system, but also allows access to those documents anytime & anywhere. This would be another centralization of information feature of the system.
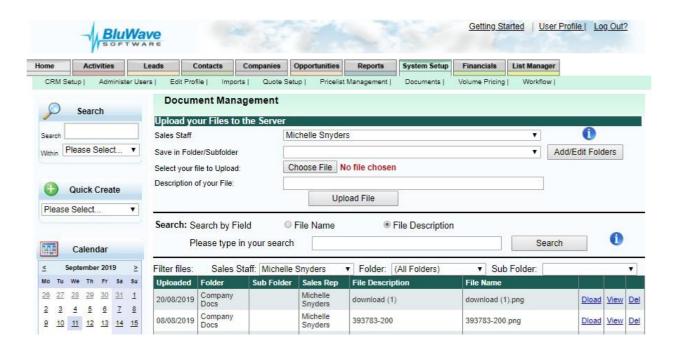
Administrators should create folders and subfolders on the BluWave document management area to allow for uploading marketing materials and quotes created by the system. These documents can then be attached to emails. Folders can either be public or private.

Public Folders are folders where other users would be able to view the content, but not add or change. A Sales manager could have a public folder dedicated to marketing brochures and catalogues.

Private Folders are used for users to add in different documentation necessary.
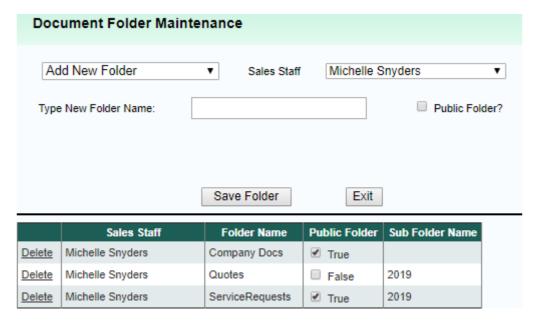Each user should have at least one folder to their name in order to store documents.

By sending quotes from BluWave, the system will create a folder called "Quotes" and the year as subfolders and save a copy of the quote in there.

To view documents that are uploaded to the system or create new folders, click on the **System Setup Tab** and then the **Documents sub-tab**.

The top portion of the screen will allow the user to add documents to the server, while the bottom portion will allow the user to search and view what documents are stored in the different folders.

To add folders for users, Click on the **Add/Edit Folders button**.

The first dropdown field will allow the user to either add in a **new folder or sub-folder**.

Then the **sales staff** would be selected to specify who the folder would be belong to.
The **folder name** could be anything; we suggest keeping it descriptive.

By checking the **Public Folder? Checkbox,** the folder and its contents would be visible to other users. They would however not be able to delete any documents in that folder.

34Email Templates

These are email templates that are used in the workflows as well as for the Birthday Email. They are set up here, and then the user would be able to select one or more of them when setting up workflows.
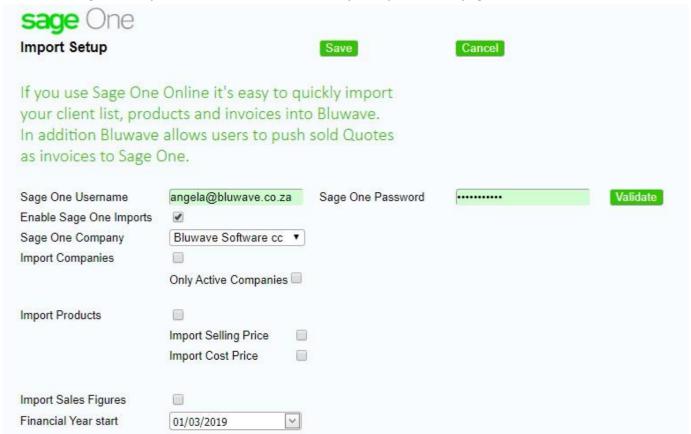
35Quote Cover Letter

Quote cover letters are pre-populated sections of information that are set up and the user would then be able to choose what cover letter to insert at the beginning of their quote. Cover letters can be adjusted as necessary when inserting them into the quote.

36Integrating BluWave with Sage One

BluWave offers free integration with Sage One, and this allows for additional features like **Post to Sage** from the **Quotes page**.
When posting to sage, the invoice would be created and pushed through to Sage One. If the debtor/products don't yet exist in Sage One, it will create it in Sage One.

To input the Sage One details go to the System Parameters option in the CRM Setup Dropdown field, click on the **Sage One Imports button** at the bottom the **system parameters page**.

Before all the settings would be visible, the sage one **username** and **password** would need to be typed in and then validated by clicking on the **Validate button**.

36.1 Enable Sage One Imports

This allows the imports to run every evening.

36.2 Sage One Company

Choose which sage one book to run the imports from.

36.3 Import Companies

This specifies whether all companies that are already on Sage One should be brought through to BluWave. **Only Active Companies** – Would only bring through the companies that are marked as active in the Sage one account.

36.4 Import Products

Specify whether the products that are loaded into Sage One should be brought through to Bluwave and then specify whether to bring through the **Selling** and **Cost** pricing.

36.5 Import Sales Figures

This allows the sales (invoices) that are created in Sage One to come through to Bluwave and close opportunities linked to those invoices.

36.6 Financial Year Start

The date specifies when the current financial year started and then posts those figures (if selected) and dates to the Financials Tab.

Remember to click on Save to save the settings.

38 Security in BluWave CRM

Main function	Security Roles	User levels						Special Rights							
		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' activties & 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														✓