



***BluWave* crm Product Fact Sheet**

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Application of *BluWave* crm



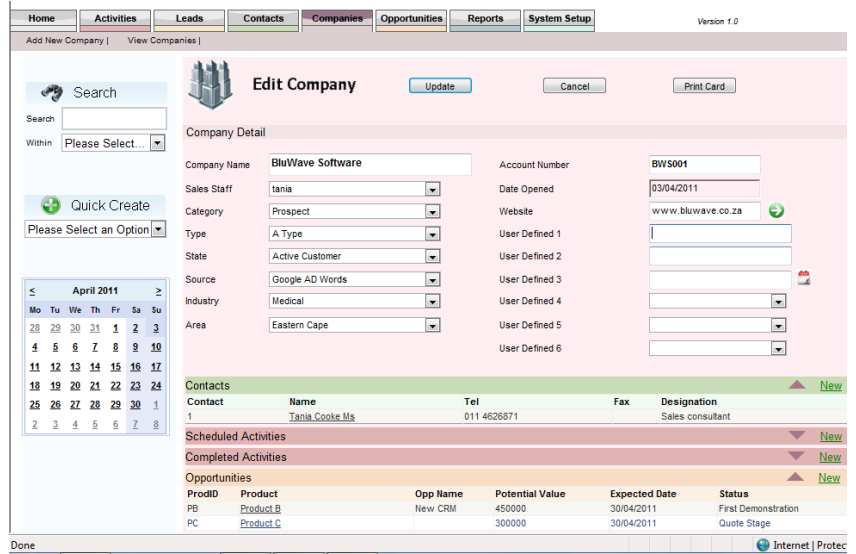
Expected Benefits from *BluWave* crm

- * The CRM solution should firstly be a tool for the sales person to assist him to be more productive and effective at his sales objectives.
- * If the sales team can manage their leads, prospects, activities, quotes and opportunities more easily this will free up more time to interact with clients. Studies show an average of 30% increase in productivity if a system such as this is employed.
- * The system can be used to track cold calling on potential prospects. The system emails productivity stats to management on this process.
- * The system can be used to track quotes and automatically generate follow-up reminders on these. Quote documents can be uploaded and linked to each opportunity.
- * Users will have instant access to quote follow-ups and a list of active new quotes. There is NO MORE EFFECTIVE way to chase new business.
- * The system can be used to manage customer service calls on existing customers and reporting thereon. The cyclical calling function allows users to set up phone or visit cycles on any preferred visit pattern. It also allows the user to plan their calls by route and then on a weekly basis to view their call plan and rearrange the week as necessary to fit prospects in with customer calls.
- * If your customer-facing staff are selling to their customers through the system then you will develop your own "Up to Date Private Market Place" of customers and prospects. You can use the system to generate targeted mailing lists and send marketing messages into your market place using other bulk emailing software.

The following functions can be applied:

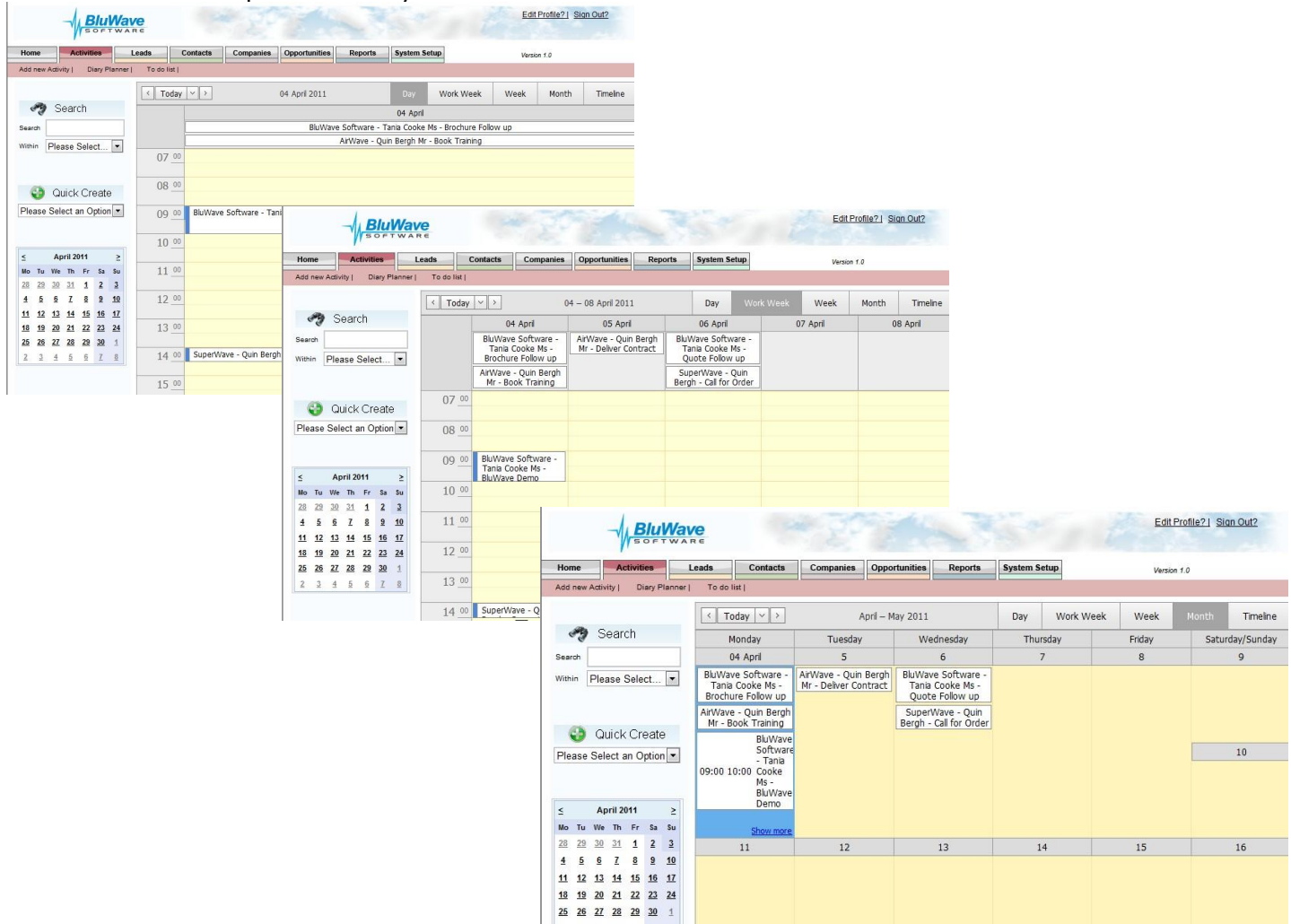
Customer and Contact Management

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

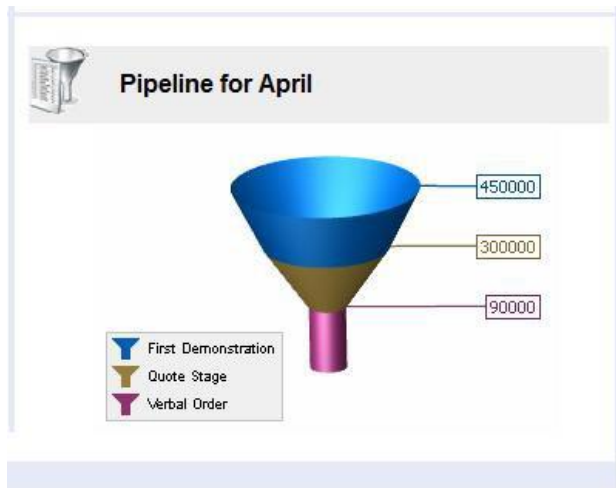
Schedule your customer and prospect follow-ups using the Activity Management function. The system manages daily, weekly and monthly views of each sales person's diary.



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.
- Upload and link your tender or quote documents to each opportunity.



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.



Manage your Territories with Cyclical Planning

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 so as to minimise the sales person's travel time across his territory.

The new feature has some in-built flexibility that designed to assist the sales person when he plans his calls for next week, allowing him the flexibility to move calls around to minimise his travel time. If the sales person is required to make appointments with customers, the system speeds up that process as the activities are already in the system he simply needs to enter the arranged time and the system will send the related appointment invite to the customer and then also book in the sales person's calendar.

	22 October 2012 - 29 October 2012						
	22 Mon	23 Tue	24 Wed	25 Thu	26 Fri	27 Sat	28 Sun
JHB East Rand: Aeroton	Sam Cycle Testing (Customer ServiceCall)		Sam Cycle Testing Cyclical Tel Call			Sam Cycle Testing (Cyclical Tel Call)	
JHB Northern Suburbs: Bryanston					3D International (Cyclical Visit)		
JHB Northern Suburbs: Centurion			ABB LOW VOLTAGE PRODUCTS (Cyclical Visit)		ABB LOW VOLTAGE PRODUCTS (Cyclical Visit)		
JHB Northern Suburbs: Honeydew	ABC VENTILATION SYSTEMS (Cyclical Tel Call)		ABC VENTILATION SYSTEMS (Cyclical Tel Call)		ABC VENTILATION SYSTEMS (Cyclical Tel Call)		ABC VENTILATION SYSTEMS (Cyclical Tel Call)
JHB Northern Suburbs: Kyalami							

Cycle Planner displays recurring activity sorted by Route & Area

Flexible Recurrence Policies

There is unlimited flexibility on the recurrence periods that can be defined. Some typical patterns that can be defined:

- every first Monday of the month
- every Wednesday fortnightly
- annually on the first Monday in April
- every second day

Recurrence:

Daily
 Weekly Day 1 of every 1 month(s)
 Monthly The Third Tuesday of every 1 month(s)
 Yearly

Quotes Automation

Use this function to generate customer quotations. This function is a great productivity booster for a sales person as it achieves 4 processes from one input.

- Select the items to be quoted and then generate a .PDF quotation document – this can be emailed or printed for the customer. It can also be cc'ed to managers.
- At the same time as you prepare the quote, the system automatically posts this opportunity into your opportunity pipeline and
- Thirdly, generates a quote follow-up activity for the sales person in the activity management function.
- Lastly the system files the emailed quote into the activity history of the customer and the document storage area of the system.

Specific features of quotes automation include:

- Upload products and pricing from an excel file. Maintain the pricing from regular uploads from your Excel price lists.
- For each product to be quotes the following is accommodated: cost and selling prices – track margins as you quote if required; Product codes and descriptions, product groups or classes for easier selection of items onto quote; A detailed product “narrative” – this can be paragraphs of text that are required to be included on the quotation to describe the product features; a linked document such as a .pdf brochure, specification sheet or picture that can be emailed to a customer with the quote when this product is quoted.
- Pictures of products can be included in the generated quotation.
- You can track quote Margins if you upload costs and selling prices (this is optional).
- The system tracks revisions of the same quote number. Each quote emailed is automatically filed into the document management storage area of **BluWave crm**.
- When a quote is emailed, this email is automatically filed into the activity history of the customer with a link to the quote document.
- Multiple options or paragraphs can be included in one quotation. This is useful for quoting alternative offerings – in which case you can indicate alternatives so as not to inflate the opportunity value. It can also be used to quote multiple products on the same quotation.
- A quote approval process can be activated where sales staff vary the selling prices.
- Two quote input formats are accommodated for differing pricing methods – work from cost price or from selling prices.
- Customer contract pricing can be stored and will default onto customer quotes.
- Multiple price lists can be stored and customers flagged for the appropriate price list – integrates to Pastel multiple price lists.
- Two printed quote formats are accommodated in the standard system.

We can provide customised quotes automation and quote out puts. A sample quotation for one of the quote formats is below:



Bobcat Equipment South Africa (Pty) Ltd
 POSTAL ADDRESS: 134079 Alroba 1421, Republic of South Africa
 PHYSICAL ADDRESS: Liebenberg Street, Alroba, Midrand
 TEL: 0800BOBCAT 0800 262200 +1 27 08 11 608 337583
 FAX: +27 08 11 604 3306
 www.bobcatsa.co.za

Ref: 1401

Bobcat S205 Turbo Skid-Steer Loader



Reference Quote No: 1401 Date: 09/07/2013
 Acc No: 29335321 Valid for: 30 Days
 To Customer: 3D Design Address: 4 Neutron St Linbro Business Park
 Attention: Mr Conrad Kullmann
 Telephone Number: 011 608 1588 From: Quinlann Bergh
 Fax Number: 011 608 0591 Tel:
 Cell Number: 082 578 3755 Cell: 082 809 3082
 Email Address: conrad@3ddesign.co.za Email: quin@bluwave.co.za

Dear Conrad
 Re: Your Enquiry on Bobcat Equipment

We thank you for the opportunity afforded us to quote you on the Bobcat Equipment.

Should you require any further information, please do not hesitate to contact us.

We are confident that you will find our pricing competitive, our service levels of a high standard, and our equipment quality only the best as you would expect from an Internationally Recognised Brand.

Yours Faithfully,

Quinlann Bergh
 Developer / Training
 082 809 3082
 quin@bluwave.co.za

Denzil Govender
 Senior Developer
 072 216 9038
 denzil@thirdwave.co.za



Co. Reg. No: 2005/01713207
 Directors: AN Wilson, AG Sidihi, GC Eganey, DR Jordan, M Akoojee,
 A Chosson, M Da Cunha / Nyawane* (*Non Executive)



Code	Description	Qty	Price	Total Rands
BB01	Bobcat S205 Turbo Skid-Steer Loader - Greater performance, visibility, comfort and value. Make/Model: Kubota/V2403 M-DI-T Fuel Cooling: Diesel/Liquid Tipping Load: 1864kg Travel Speed: 11.3 km/h Operating Weight: 2831 kg Proven power, smooth ride and vertical lift capabilities and you've got a skid steer loader that delivers top performance, no matter what the job.	1	345,000.00	345,000.00
BB02	Power Bob-Tach	1	18,500.00	18,500.00
BB03	Hydraulics Package	1	21,000.00	21,000.00
TOTAL (Ex TAX)				R 384,500.00
TAX				R 57,675.00
Total:				R 442,175.00

Code	Description	Qty	Price	Total Rands
BB04	Warranty - BOBCAT [®] are the only supplier that can offer an extended warranty for 4000 hours.	1	18,500.00	18,500.00
TOTAL (Ex TAX)				R 18,500.00
TAX				R 2,775.00
Total:				R 21,275.00

Code	Description	Qty	Price	Total Rands
DA1	Bucket 36in. Utility	1	1,500.00	1,500.00
DE3	Clamp	1	800.00	800.00
DE2	Bucket 48in. Utility	1	2,500.00	2,500.00
DE4	Bale Squeeze	1	2,800.00	2,800.00

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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. Book appointments in BluWave and they will be automatically posted to your calendar. Send customer emails and they are stored in **BluWave crm**.

The Email Filing feature of **BluWave crm** allows you to automatically file your incoming and outgoing email by simply Bcc'ing or forwarding your emails to the BluWave Server email address. Tracking customer relationships and sales in progress is now easier than ever before with **BluWave crm**.

The filed emails will be stored as part of the activity history of the customer in chronological order with your telephone call and face to face call reports. You can file email from any email software program – either desktop email clients or web-based email client software including: Outlook, Lotus Notes, and Google Mail.

Workflow Automation

Businesses cannot achieve ROI from CRM by renting a CRM system and feeding in data. Process automation is one method of reaping rewards from CRM.

The following benefits accrue from process automation:

- Consistent performance from the sales team
- Improved productivity
- Repeatable successes
- Improved responsiveness to customers to enhance customer satisfaction levels

Often the sales and marketing processes of a business are the least documented and structured areas of the business. Customers who focus on the processes will find areas that can be automated. This frees up sales staff to concentrate on the "Art" of selling that is not yet easy to automate, spending time developing deal propositions, discussing customer requirements and negotiating and closing sales.

The following are the types of processes that can be automated in **BluWave crm**:

- **Automation of tedious manual processes** e.g. feeding of web enquiries directly into your CRM database. Built into BluWave CRM is a free automated web service which allows all customers to push their web site enquiries directly into the BluWave CRM database.
- **Business process to assign resources based on an event** e.g. automate the allocation of leads from a website based on a product or region selection. For example you can use the new workflow function to trigger an email and a task for the sales person to whom you have routed the lead.
- **Triggering of client facing events** e.g. personalised responses to a sales enquiries. For example, an automated campaign that sends a weekly personalised email directly to the potential customer "from the sales person" to deliver a message about a function and the benefits thereof.
- **Automated prompts on customer anniversary dates** e.g. contract renewals or customer equipment service prompts.

- **Prompts to the sales team to monitor critical processes**, for example, with the new workflow process in BluWave you can trigger an internal email to senior manager when a new high value opportunity is raised in the system.

Workflow Designed for Ease of Use by Users

In all our development efforts we strive to develop practical solutions that an SME can easily apply without having to bring in experts. The design of the new function is wizard driven with 4 easy steps to follow to add an automated process to **BluWave crm**.

The graphic below is a picture of the wizard driven process.

The screenshot displays the 'Workflow' configuration wizard in BluWave CRM. The interface includes a top navigation bar with tabs for Leads, Contacts, Companies, Opportunities, Reports, System Setup (selected), Financials, and List Manager. A breadcrumb trail shows the path: sers | Edit Profile | Imports | Quote Setup | Pricelist Management | Documents | Volume Pricing | Workflow |. The main content area is titled 'Workflow' and features a progress bar with four steps: Step 1 (Basic Information), Step 2 (Workflow Triggers), Step 3 (Workflow Criteria), and Step 4 (Workflow Actions). Step 2 is currently active. Below the progress bar, there are input fields for 'Entity' (Companies) and 'Workflow Name' (New Prospect Intro). At the bottom, there is a rule configuration section with fields for 'Field' (Sales Staff), 'Operator' (=), 'Condition' (Administrator), and 'Connector' (AND).

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.

Mailing List Management

The system has a list generation function to allow you generate lists for email or SMS merges. You can generate lists on company details, contact details, activity history and opportunity tracking history. Generate targeted lists and output to TouchBase Pro or any web-based mailing package;

TouchBase Pro allows you to customize your own HTML message with text and graphics or pictures; Use 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 unsubscribes are saved in your TouchBase account. This function will integrate with any web-based email merge software.

Leads Management

A web service is available for your web developer to post enquiries directly from your web site to the sales staff in **BluWave crm**. If this is done the users 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 actioned 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 Sales Invoice History

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. The financial integration module emails daily sales history to the **BluWave crm** server from your financial system. Most local systems supported including Pastel Partner and Evolution, Syspro, SAP & Accpac.

The interfaces already available including the web services to automatically import these items include:

- Product codes descriptions and groups.
- Product costs and up to 10 price lists.
- Customers or Debtors
- Customer contract or special pricing
- Customer group pricing
- Sales history

The following displays a view of a customer’s sales history in this case the customer is “DEF ENGINEERING”. You can select to view sales at product detail level or grouped into product categories.



View Sales

Company : * 🔍

Group By :

-
-

Financial Year : ▼

View : Value Units

Switch between sales in rands or sales volumes (Tons, KGs, Litres) using this radio button.

Financials																	
Sales Rep	Product	BA	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	P11	P12	YTD Total	YTD Variance	
Tania Cooke-Tonnesen	Bosui Pad size 60x90mm	Actuals	0	0	0	0	0	0	0	0	0	0	0	0	303.88	303.88	0
Tania Cooke-Tonnesen	Bosui Pad size 60x90mm	Budgets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	303.88
Tania Cooke-Tonnesen	Bosui Pad size 120x250mm	Actuals	0	0	0	0	0	0	0	0	0	0	0	0	378.25	378.25	0
Tania Cooke-Tonnesen	Bosui Pad size 120x250mm	Budgets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	378.25
Tania Cooke-Tonnesen	Bosui Pad size 50x80mm	Actuals	0	0	0	0	0	0	0	0	0	0	0	0	253.3	253.3	0
Tania Cooke-Tonnesen	Bosui Pad size 50x80mm	Budgets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	253.3
Tania Cooke-Tonnesen	Bosui Pad size 50x80mm	Actuals	0	0	0	0	0	0	0	0	0	0	0	0	253.3	253.3	0
Tania Cooke-Tonnesen	Bosui Pad size 50x80mm	Budgets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	253.3
Tania Cooke-Tonnesen	Bosui Pad size 80x120mm	Actuals	0	0	0	0	0	0	0	0	0	0	0	0	628.16	628.16	0
Tania Cooke-Tonnesen	Bosui Pad size 80x120mm	Budgets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	628.16
Tania Cooke-Tonnesen	Burnaïd Gel 25gm (Boxed) (PHY)	Actuals	0	0	0	0	0	0	0	0	0	0	0	0	143.06	143.06	0
Tania Cooke-Tonnesen	Burnaïd Gel 25gm (Boxed) (PHY)	Budgets	0	0	0	0	0	0	0	0	0	0	0	0	0	0	143.06
			Sum=0	Sum=0	Sum=0	Sum=0	Sum=0	Sum=0	Sum=0	Sum=0	Sum=0	Sum=0	Sum=0	Sum=0	Sum=5377.8	Sum=5377.8	Sum=5377.8

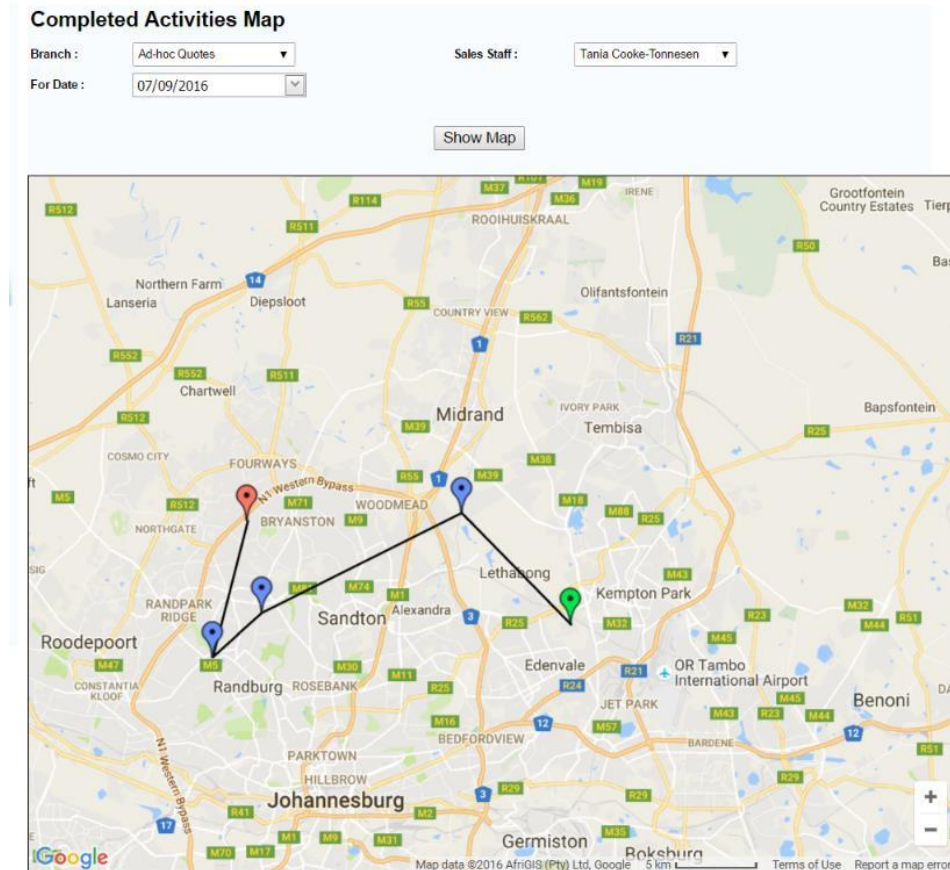
Page 1 of 5 (50 items) < [1] 2 3 4 5 >

Company Totals													
	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	P11	P12	Totals
Actuals :	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 5,377.80	R 5,377.80
Budgets :	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00
Variance :	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 5,377.80	R 5,377.80

This View display year to date sales month by month for each product sold to the customer – you can select a summarised view by product category. The user can also select to view unit sales for the year if you are tracking sales volumes. The variance to year to date budget is also calculated. Total sales are displayed at the bottom of the page for this customer year to date.

Geocoding and Mapping now built into BluWave CRM

BluWave crm automatically geocodes (adds latitude and longitude) to each customer as the physical address is entered. BluWave also provides geocoding services to geocode batches of existing customers as they are uploaded to BluWave.



The Following benefits accrue from this new feature:

- BluWave now speeds up the process of logging visit reports as the system automatically defaults where he is currently situated and defaults to that customer.
- Sales staff can now narrate their visits to the system and it translates their voices to a text report.
- The system records the geolocation and time of each call report made as the salesperson travels from customer to customer.
- BluWave **automatically generates the sales person's travel claim** from the visit reports entered. No more burning the midnight oil to submit travel claims to the office or The Receiver. BluWave calculates distance travelled and works out the travel cost for each month.
- The system graphs on a google map the movements of the sales team from their geo-located visit reports.
- BluWave BI now makes use of the geocoded customer and prospect database to perform mapping of all the data in BluWave CRM and Service. For example, customers and prospects can be displayed on a Google map in different colours; quote values and sales revenue can be mapped in different colours.



Travel Claim Report By Rep and Date

For Period : 01/05/2017 to 08/05/2017

Branch Description :		Bryanston			
Sales Staff :		Tania Cooke-Tonnesen		Rate per Km:2.5	
Activity Date	Company Name	Contact	Activity	Distance (Km)	Cost
2017-05-02 00:00	Waste Management	Chantelle Smith	Project Planning	0.1	0.25
2017-05-02 09:30	Business Consultants	James Jones	BluWave Consultation	4.3	10.75
2017-05-02 13:30	Contract Staffing	Jeremy Lowe	BluWave Consultation	0.0	0.00
2017-05-02 23:59	Office		Office	4.3	10.75
Total For Date :		4		8.7	21.75
Activity Date	Company Name	Contact	Activity	Distance (Km)	Cost
2017-05-04 10:30	Printing Company	Philip Brown	BluWave Consultation	20.1	50.25
2017-05-04 13:30	Medical Supplies	Christian Barnard	BluWave Consultation	47.4	118.50
2017-05-04 15:30	IT Services	Mark Van Vyk	BluWave Consultation	53.0	132.50
2017-05-04 23:59	Office		Office	0.1	0.25
Total For Date :		4		120.7	301.50
Activity Date	Company Name	Contact	Activity	Distance (Km)	Cost
2017-05-05 08:30	Printing Company Online	Tiffany Swart	BluWave Consultation	38.9	97.25
2017-05-05 11:00	Business Consultants	James Jones	BluWave Consultation	24.2	60.50
2017-05-05 23:59	Office		Office	30.9	77.25
Total For Date :		3		94.0	235.00
Activity Date	Company Name	Contact	Activity	Distance (Km)	Cost
2017-05-08 11:30	Stainless Steel	Pieter Holmes	BluWave Consultation	47.3	118.25
2017-05-08 23:59	Office		Office	50.6	126.50
Total For Date :		2		97.8	244.75
Total For Rep :		13		321.2	803.00
Total For Branch :		13		321.2	803.00