



## ***BluWave crm***

### **New Push Graphs Reports**

## Introduction

A new feature of the BluWave CRM allows users to request “push” reports that can be used to track or manage the performance of the sales reps, the branch, the whole company or even an entire franchise in terms of number of opportunities sold, forecasted sales, quotes issued, new leads loaded and the conversion ratio of quotes to sales for a selected period of time. The users and branches will have a predefined target for No. of units to sell and No. of quotes to issue for the system to draw comparisons and generate the reports.

The graphs can be requested by users (self only) managers (whole branch – showing each rep in the branch), Senior Managers (all branches – showing stats per branch). The BluWave CRM server sends the requested reports in 6 hour intervals running from 10:00 am, 4:00 pm, 10:00 pm and 4:00 am. The server will check for reports that have been requested and will send them at those times.

Once set up, the server automatically emails this requested reports to the respective user hence they are not manually expected to run the reports.

## Setup – Defining the Graphs Required

To define graphs required and set up the running dates, navigate to the push report setup menu under the reports menu as shown below.

The screenshot shows the 'Push Reports List' interface. The navigation menu includes Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, and System Setup. The 'Reports' menu is active, showing 'Report List' and 'Push Report Setup'. The main content area displays a table of scheduled reports:

	Requested By	Report Name	Frequency	Period	Level	Next Run Date	Seq
<a href="#">Edit</a> <a href="#">Delete</a>	Tania	Conversion Rate - No Quotes:Sales Orders	Monthly	Current Month	Company	01/11/2011	1
<a href="#">Edit</a> <a href="#">Delete</a>	Tania	Conversion Rate - No Quotes:Sales Orders	Monthly	Previous Month	Company	01/08/2011	2
<a href="#">Edit</a> <a href="#">Delete</a>	Tania	Conversion Rate - No Quotes:Sales Orders	Monthly	Previous Month	Branch	01/08/2011	3
<a href="#">Edit</a> <a href="#">Delete</a>	Tania	Conversion Rate - No Quotes:Sales Orders	Monthly	Previous Month	User	01/08/2011	4
<a href="#">Edit</a> <a href="#">Delete</a>	Tania	Forecast Unit Sales	Monthly	Current Month	Company	22/09/2011	1
<a href="#">Edit</a> <a href="#">Delete</a>	Tania	Forecast Unit Sales	Weekly	Current Month	User	05/09/2011	2
<a href="#">Edit</a> <a href="#">Delete</a>	Tania	New Enquiries Received Month-to-Date	Monthly	Current Month	User	22/09/2011	1
<a href="#">Edit</a> <a href="#">Delete</a>	Tania	New Enquiries Received Month-to-Date	Monthly	Previous Month	Company	22/09/2011	2

Below the table is a form to 'Add a New Report to the list above' with the following fields:

- Select Report: [Dropdown]
- Frequency: [Dropdown]
- Period: [Dropdown]
- Level: [Dropdown] (set to User)
- Next Run Date: [Date Picker] (set to 02/10/2011)
- Add New Report: [Button]

**Select Report** – Select the report you want to set up from the drop down list. There are five graphical reports currently available namely:

- Number of Units Sold v's Target MTD (Month-to-Date)
- Forecast Number of Sales for Current Month v's Target
- Number of Quotes Issued MTD V's Target
- Number of New Leads Loaded MTD
- Conversion Rates Quotes to Sales for a Selected Period (usually 3 to 6 months)

More reports and graphs will be added in future versions of **BluWave crm** and we encourage users to suggest other kinds of reports they would like to receive.

**Frequency** – Allows the user to select how often they want the respective reports to be emailed to them i.e. monthly or weekly.

**Period** – Indicate the time period for which you want the selected report to be run.

**Level** – The security roles granted to the user determines the level of the report that can be generated.

- “User” level security will only allow the user to view reports generated at User level i.e. on their own data. They cannot view other users’ reports.
- “Manager” level security will allow the manager to view reports from the entire branch.
- “Executive” level security allows the specific user to view reports from the various branches that form part of the company
- “Franchise” level allows the Franchise owner to view reports from the various franchisees.

**Next Run Date** – This tells the system the next date to run the report. The BluWave CRM server sends the requested reports in 6 hour intervals running from 10:00 am, 4:00 pm , 10:00 pm and 4:00 am. When the next run date is reached then the server will check for reports that have been requested and will send them at these times.

Once the above fields have been populated, click on the “add new report” button.

## Defining the Targets

To generate this graphs, the target monthly unit sales and target quotes to be issued per month need to be entered in the system. This is done on the Quote Setup page under system set up. All users will have to have these targets entered.

The screenshot shows the 'Quotes Setup' page in the BluWave CRM system. The page is divided into several sections. At the top, there is a navigation bar with tabs for Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, and System Setup. Below the navigation bar, there is a search bar and a calendar. The main content area is titled 'Quotes Setup' and contains the following fields:

- Starting Quote No: 1253
- Validity In Days: 14
- VAT (TAX): 14
- Default Quote Status: Quote Stage
- Default Quote Activity: Quote
- Quote Header Paragraph: We are passionate about our environment and we are committed to the development of a new low carbon economy. We are excited and humbled to offer you a product that empowers you to be part of the solution.
- Quote Footer Paragraph: (Empty text area)
- TOTAL Line Text: (Empty text area)
- LOGO - (The selected Logo image must be a JPG of less than 100KB in size.): BluWave SOFTWARE
- Discount/Rebate Section?: No
- Include Product ID?: No
- Targets: Monthly Unit Sales: 30
- Quotes to issue per Month: 30
- Discount Line 1: (Empty text area)
- Discount Line 2: (Empty text area)
- Page Footer: (Empty text area)
- Email Text: (Empty text area)

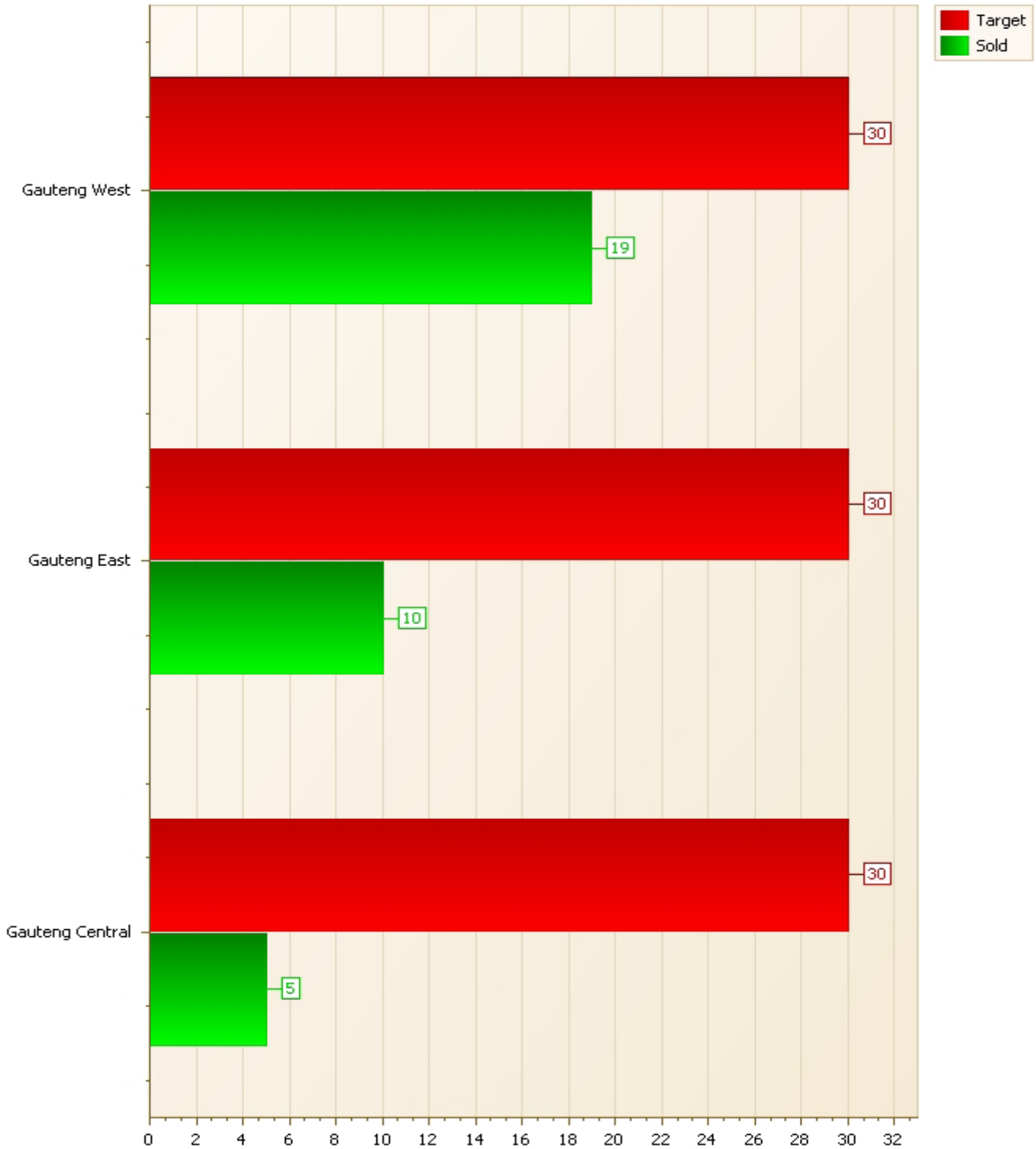
At the bottom of the page, there are two buttons: 'Optional Quote Terms' and 'Rate of Exchanges'. The 'Update Details' button is located at the top right of the main content area.

Click on “update Details” to save the Targets

### 1. Number of Units Sold vs. Target MTD (Month-to-Date)

This graph shows the actual number of units sold month-to-date. The report always runs from the first of the month to the report date. The actuals are compared to the full month target.

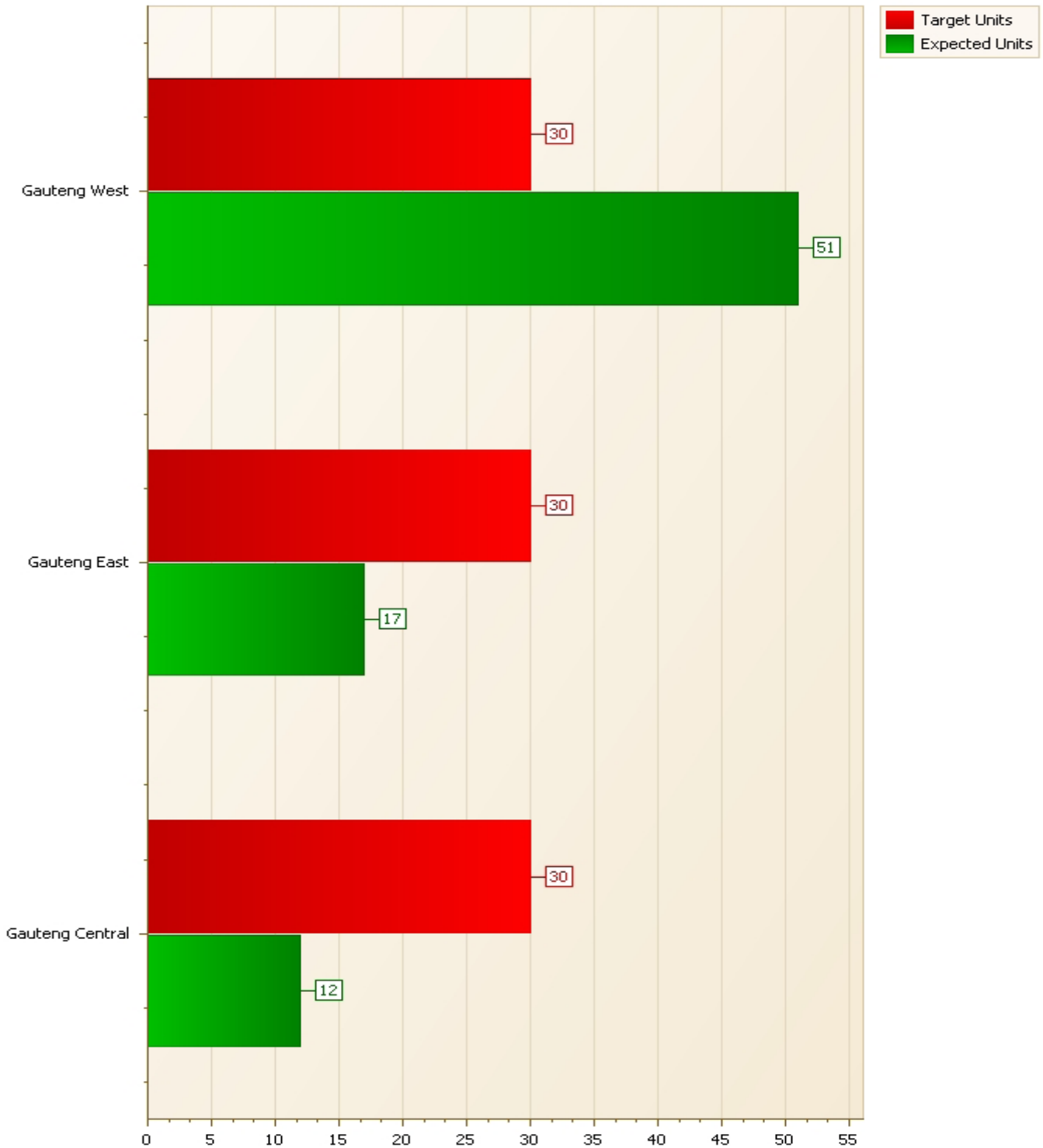
**Number of Units Sold MTD V's Target for Company XYZ for the month of August.**



## 2. Forecast Unit Sales Report

This graph analyses the Sales Pipeline and graphs the expected sales against the target set for the branch. The expected order dates and probability of the opportunities are used to determine the expected sales for a given time period.

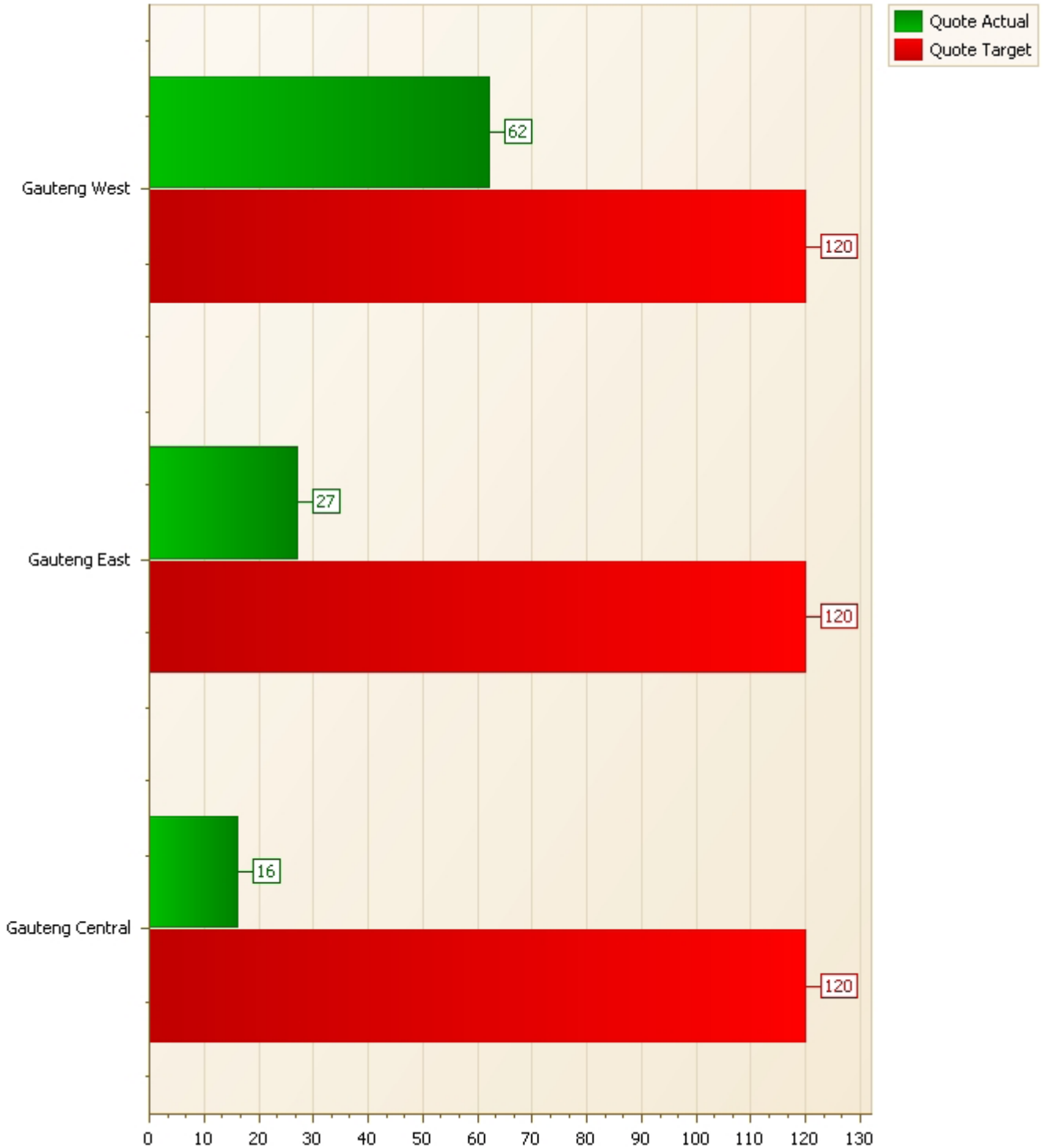
### Forecast Unit Sales for Company XYZ For The Month



### 3. Number of Quotes Issued MTD vs. Target Report

This graph compares targeted numbers of quotes against actual numbers of quotes issued for the current month-to-date.

#### Quotes Issued MTD vs. Target For the Month

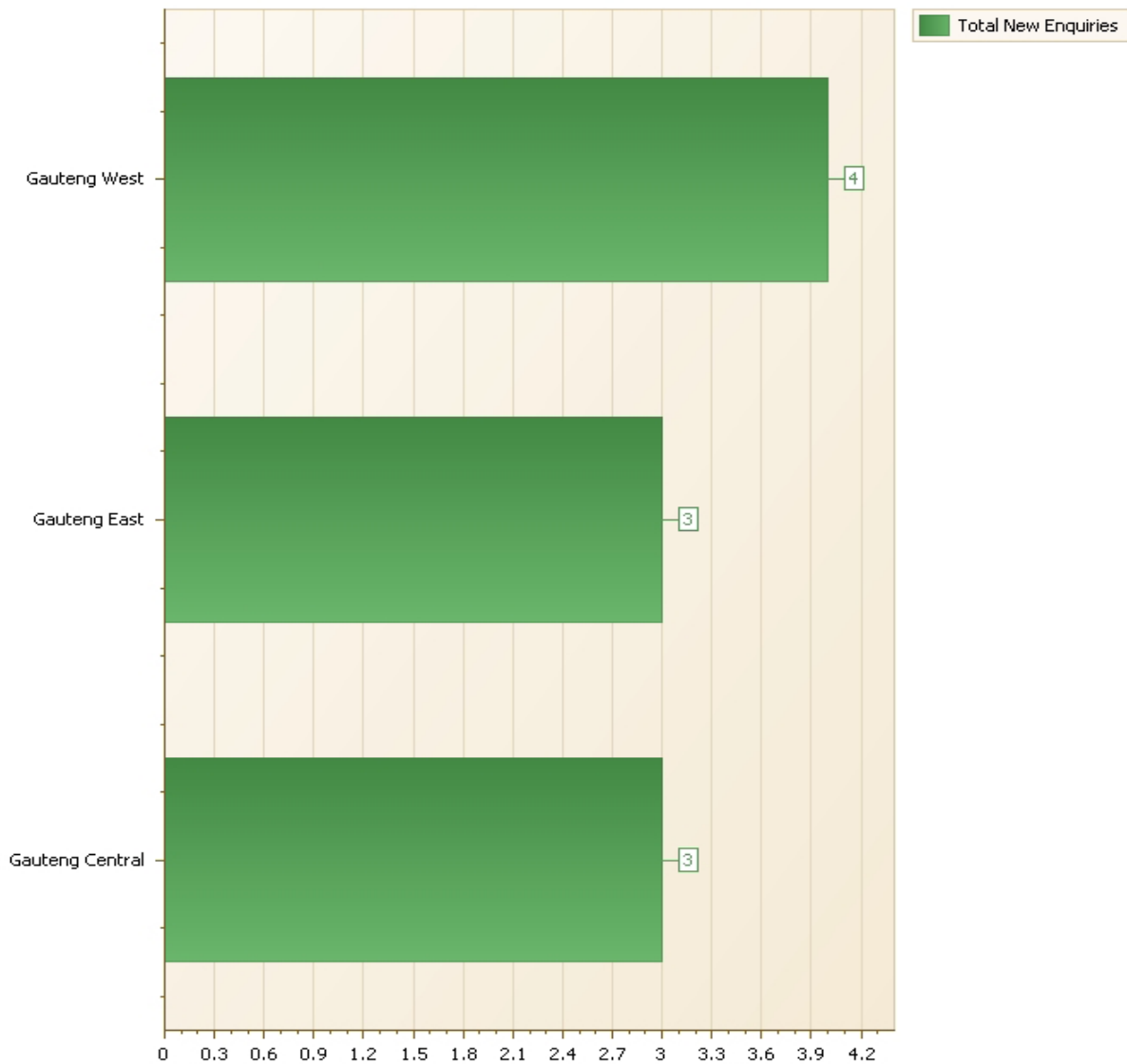


Quotes Issued = 105  
 Quotes Target = 360  
 Ratio = 29.17%

#### 4. New Enquiries Received Report

This report details the number of new leads loaded in a particular month.

##### New Enquiries Received for XYZ Wholesalers For The Month

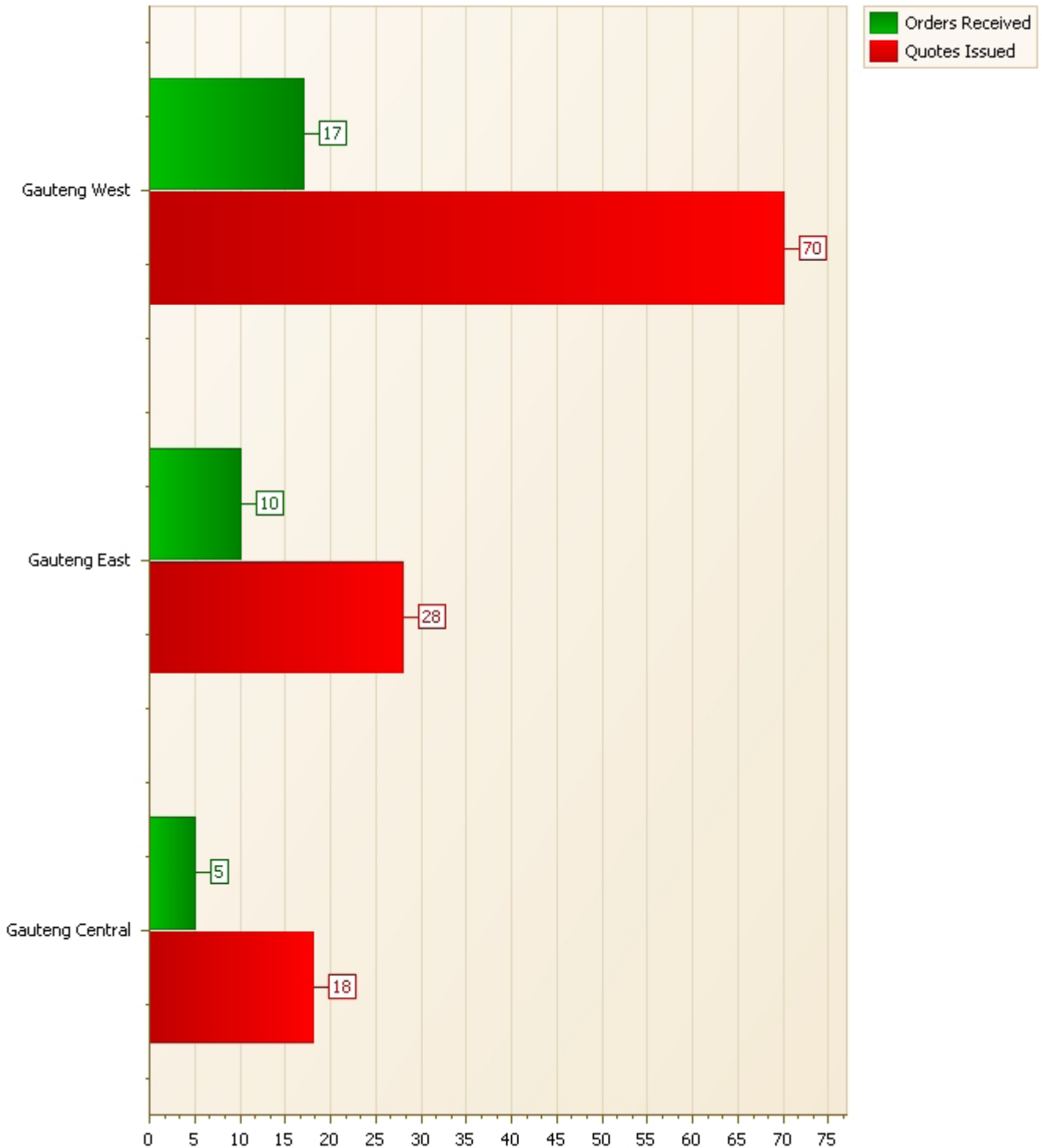


**Total New Enquiries = 10**

## 5. Conversion Rates Quotes to Sales Report

This graph shows the number of quotes issued against the number of orders for a selected period – say 3 to 6 months.

### Number of Quotes V's Orders for Period Jan – Mar 2011



**Quotes Issued = 110**  
**Orders Received = 34**  
**Conversion Ratio = 30.9%**