



BluWave CRM & Service - Managing Users



For support please contact: 011 462 6871 or support@bluwave.co.za.

Managing Users

BluWave makes provision for both Active and Inactive Users.

Active users can log in using their username and password, and use the system as normal.

Inactive users are added to the system in order for the active users to include them in meeting requests and emails; as well as use the email filling functionality.

Licences on BluWave aren't linked to a user's name, but rather to the amount of active users.

If a user is no longer using the system or leaves your organisation, it is recommended you do NOT change a user's profile name, but rather de-activate the user. This helps with tracking which user has entered specific information on the system in the past.

1. Adding New Users

Adding new users to BluWave can be done as follows:

1. Click on the System Setup Tab
2. Click on the Administer Users Tab underneath

The system administrator will be able to add as many Users as required, however the number of Active Users will be determined by the number of licenses the company has purchased.

The screenshot shows the BluWave CRM interface. At the top, there are navigation tabs: Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, Financials, and List Manager. Below these are sub-tabs: CRM Setup, Administer Users, Edit Profile, Imports, Quote Setup, Pricelist Management, Documents, and Workflow. The main content area is titled "Security Roles" and includes a "New User" button and radio buttons for "Active" and "Inactive". Below this is a table with the following data:

	Full Name	Branch	Active User	Restricted User	Manager	Restricted Manager	Executive	System Admin	Setup	List	GP	Approval	Product Manager	Claim Leads	Restrict	Create Non Stock
Edit	Byron Cooke-Tonnesen	Johannesburg	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Michelle Snyders	Johannesburg	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Thobanjalo Shangase	Johannesburg	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click on "New User" and this will allow the system administrator to enter the new user's details to create their account on BluWave CRM as shown below.

The screenshot shows the 'New User Details and Roles' form in the BluWave CRM. The form is divided into several sections. On the left, there is a search bar and a calendar for April 2019. The main form area contains the following fields and options:

- Full Name:** Hansie Keller
- Monthly Target:** 0
- Branch:** Johannesburg
- Date Captured:** 11/04/2019
- Designation:** Office Manager
- Active?:**
- Telephone:** 012 457 8956
- Rep Code:** HK
- Cell:** 074 844 8574
- Email:** hansie@keller.co.za (Note: This Email address will be used as the User Login Name.)
- Do all Quotes from this user Require Approval?:**
- Roles:** User, Manager, Executive, System Admin, Setup, List, GP, Approval, Claim Leads, Product Manager, Restricted User, Restricted Manager, Restrict Pricelist, Create Non-Stock Items

At the bottom of the form, there are three buttons: 'Save User Details', 'Save & New', and 'Cancel'.

All details, except the username and the date captured, can be changed as needed after the information is saved.

The users' contact details should be filled in, as well as which branch they are associated with.

The email address entered will also become their username. Should you require a user name to be changed you can email support and ask our system administrators to do this (if you make a mistake or your company email addresses change etc).

The active check box will make this new users profile active when ticked. If it seems the checkbox can't be ticked, it is because the licenses have all been used.

The rep code should be the same as the users rep code used in the company's accounting system. This is used when we import sales from your accounting system.

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.

Click on "Save User Details" to create the account, or "Save & New" should an additional account needs to be created.

Once a new user is added to the system, they will automatically receive an email with their username and password. (If they weren't made active- they will still receive an email, however they won't be able to login in BluWave).

2. Edit My Profile/Change Password

This page allows the User (or System Administrator) to access their 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.

The screenshot displays the 'Edit User Details and Roles' interface. At the top, there are navigation links: 'Getting Started', 'Change Password', and 'Log Out'. Below this is a menu bar with tabs for 'Home', 'Activities', 'Leads', 'Contacts', 'Companies', 'Opportunities', 'Reports', 'System Setup', and 'Financials'. Under 'System Setup', there are sub-links: 'CRM Setup', 'Administer Users', 'Edit Profile', 'Imports', 'Quote Setup', 'Pricelist Management', 'Documents', and 'Workflow'.

The main content area is titled 'Edit User Details and Roles'. It contains several sections:

- User Information:** Full Name (Thobanjalo Shangase), Branch (Johannesburg), Designation (Developer), Telephone (0114626871), Email (thoba@bluwave.co.za), and User Name (thoba@demo.co.za). There are 'Change Password' and 'HTML Signature' buttons.
- Monthly Targets:** A table with columns for 'No of Quotes', 'Target Quoted Value', 'Target Sales Value', 'GP Value', 'No of Units', and 'No of Face-to-Face Visits'. All values are currently 0.
- Location and Settings:** 'Start and End GIS Location' (Use Current Location, Select From Map), 'Rate Per Km' (0), 'Active' (checked), and 'Approval Manager' (dropdown).
- Preferences:** 'Do you want to copy your active opportunities to the current month?' (checked), 'Do all Quotes from this user Require Approval?' (unchecked), 'Track Geo Location of Activities?' (checked), and 'Default New Activity Company to the nearest Company based on Geo location?' (checked).
- Email Settings:** 'Do you want BluWaveCRM to book appointments into your email calendar?' (unchecked). Radio buttons for 'POP3 (iCal)', 'Gmail', and 'Exchange/Outlook 365' are present.
- Email SMTP Settings:** SMTP (smtp.gmail.com), SMTP User Name (shangasett@gmail.com), SMTP Password (masked), and SMTP Port (25). A 'Test SMTP Settings' button is available.
- Roles:** A list of roles with checkboxes: User (checked), Manager (checked), Executive (checked), System Admin (checked), Setup (checked), List (checked), GP (checked), Approval (checked), Claim Leads (checked), Product Manager (unchecked), Restricted User (unchecked), Restricted Manager (unchecked), Restrict Pricelist (unchecked), and Create Non-Stock Items (unchecked).

At the bottom, there are three buttons: 'Update Details', 'Update & New', and 'Cancel'.

On this page, the user can also:

- Activate the Geo location tracking of activities for Travel Claim Report purposes. (Please request the manual for this feature.)
- Specify whether they want the system to post appointments to their Email calendar.
- Specify whether they are using a local calendar e.g. Outlook or a web based calendar e.g. Gmail, by selecting the appropriate radio button.
- Enter their Email SMTP settings or Exchange settings (Server/Exchange Web Service, Username, and Password) on this page to allow the sending of emails from BluWave.

Only a System Administrator can change the following:

- **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 login for users who have left the company.
- **Monthly Target**- Indicates the monthly revenue target set for the sales representative.

3. De-activating a User

Should a user leave the company, the system administrator can deactivate their account by deselecting the “Active” tick box.

Inactive users won’t be able to log into the system.

Another license will then be available to create a new user.

If this user does get replaced by a new employee, the system administrator would create a new user, and tick the “Active” checkbox. From a reporting side you will then be able to see where the previous employee’s trail ends, and where the new employee’s trail begin.

Uncheck the “Active” checkbox and update details for users who have left the company.

The screenshot shows the 'Edit User Details and Roles' form for a user named Michelle Snyders. The form is divided into two columns. The left column contains fields for Full Name (Michelle Snyders), Branch (Johannesburg), Designation (Implementation Consultant), Telephone (011 462 6871), Cell (074 586 3506), Email (mibpsnyders@gmail.com), and Active (checked). The right column contains fields for User Name (michelle@demo.co.za), Date Captured (03/09/2018 00:00:00), and buttons for Change Password and HTML Signature. A note below the buttons states: 'To Change your Password, first click on the Change Password button.' An arrow points from the text above to the 'Active' checkbox.

4. BluWave Security Roles

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' activities & 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															✓