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.
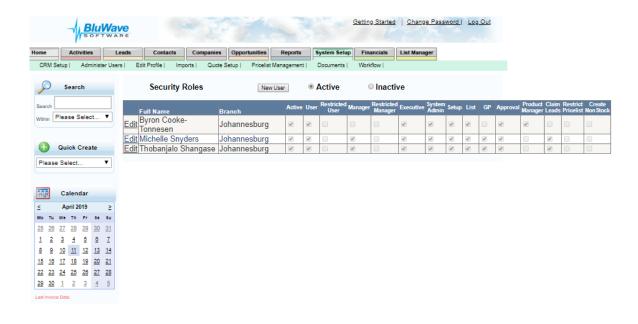
1. Adding New Users

Adding new users to BluWave can be done as follows:
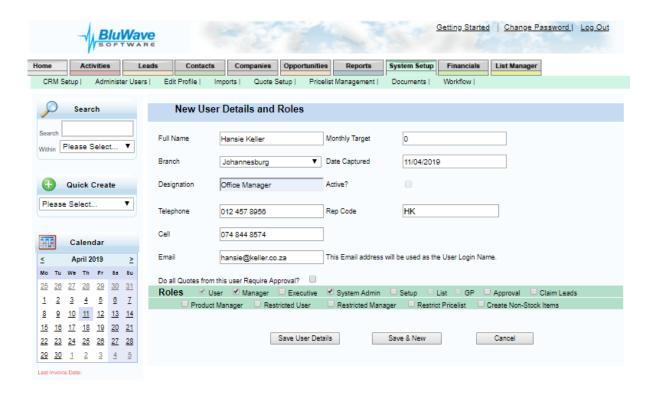
1. Click on the System Setup Tab
2. Click on the Administer Users Tab underneath

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.

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.

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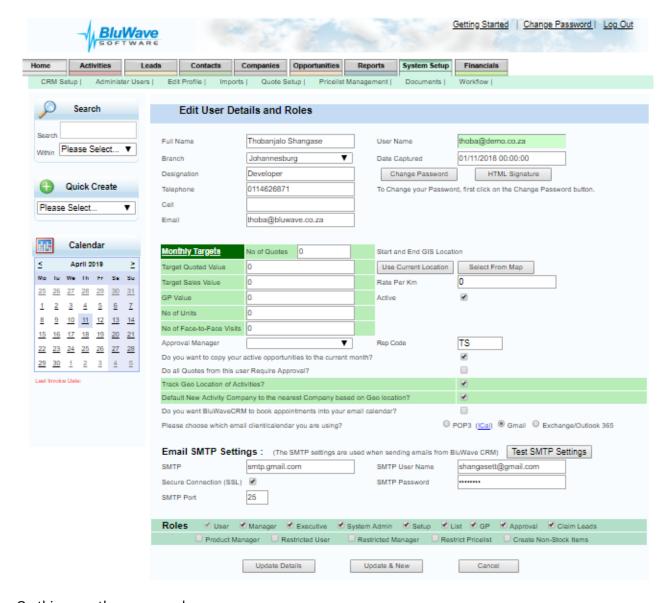
Click on "Save User Details" to create the account, or "Save & New" should an additional account needs to be created.

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.

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 (Sever/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.
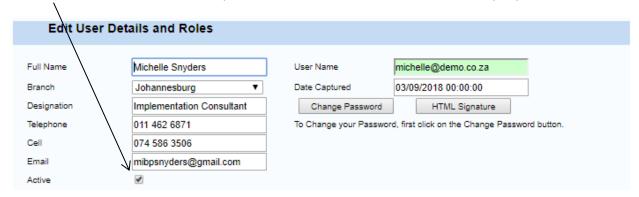
3. De-activating a User

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.

Edit User Details and Roles

Full Name	Michelle Snyders	User Name	michelle@demo.co.za
Branch	Johannesburg ▼	Date Captured	03/09/2018 00:00:00
Designation	Implementation Consultant	Change Password	HTML Signature
Telephone	011 462 6871	To Change your Password, first click on the Change Password button.	
Cell	074 586 3506		
Email	mibpsnyders@gmail.com		
Active	✔		

4. BluWave Security Roles

Main function	Security Roles	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														✓