BluWave CRM System Setup Manual

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

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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** menu and the options underneath.

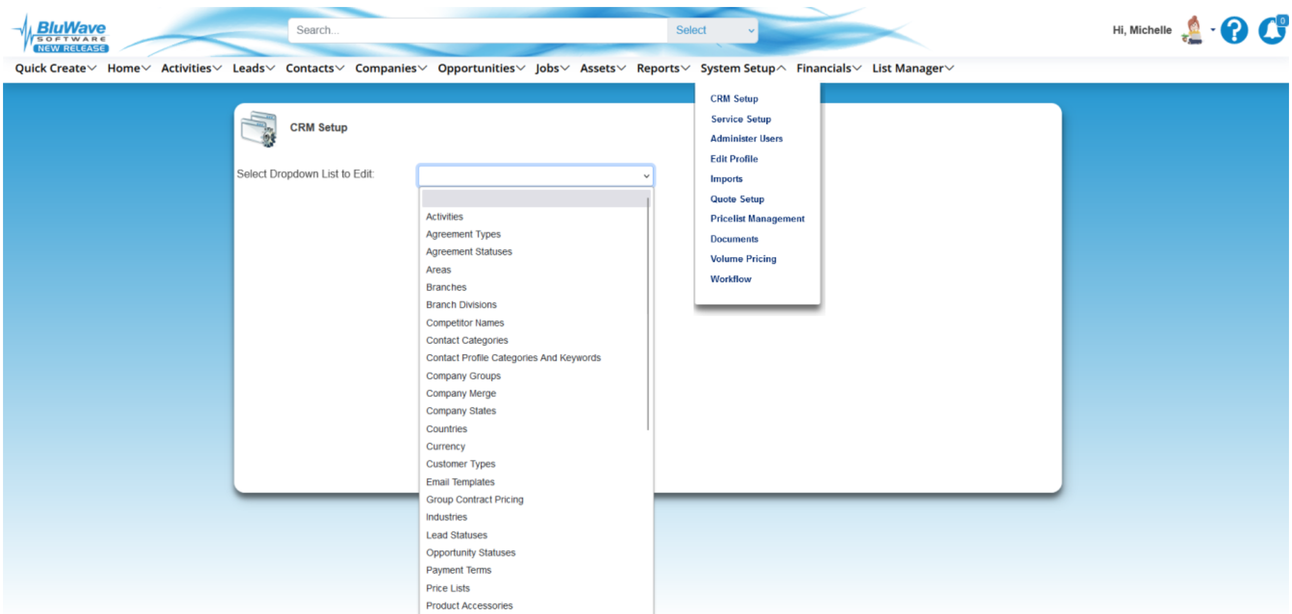
In order for your system to be used in a live environment, and to ensure that the system implementation, training and user adoption is effective, please take care to set up as many of the areas/functions are possible.

When setting up your system if would be a good idea to not only think of your current processes, but any future requirements and processes you wish to implement as well as what information you might require from reporting. Reporting on data can only be done if the users have selected and added the necessary info into the system.

For your convenience we have added some entries to most of the setup options as examples. You are more than welcome to edit, delete or add to these.

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 these changes.



For security purposes that system will timeout after 20 minutes, if the users do not save, update, or move about the system.

Users Section

We will start the setup by making sure that your users are added, and their profiles are fully setup. Please make sure to add the Branches before adding the Users.

2. Branches

NB! You will need to add these first before adding your users.

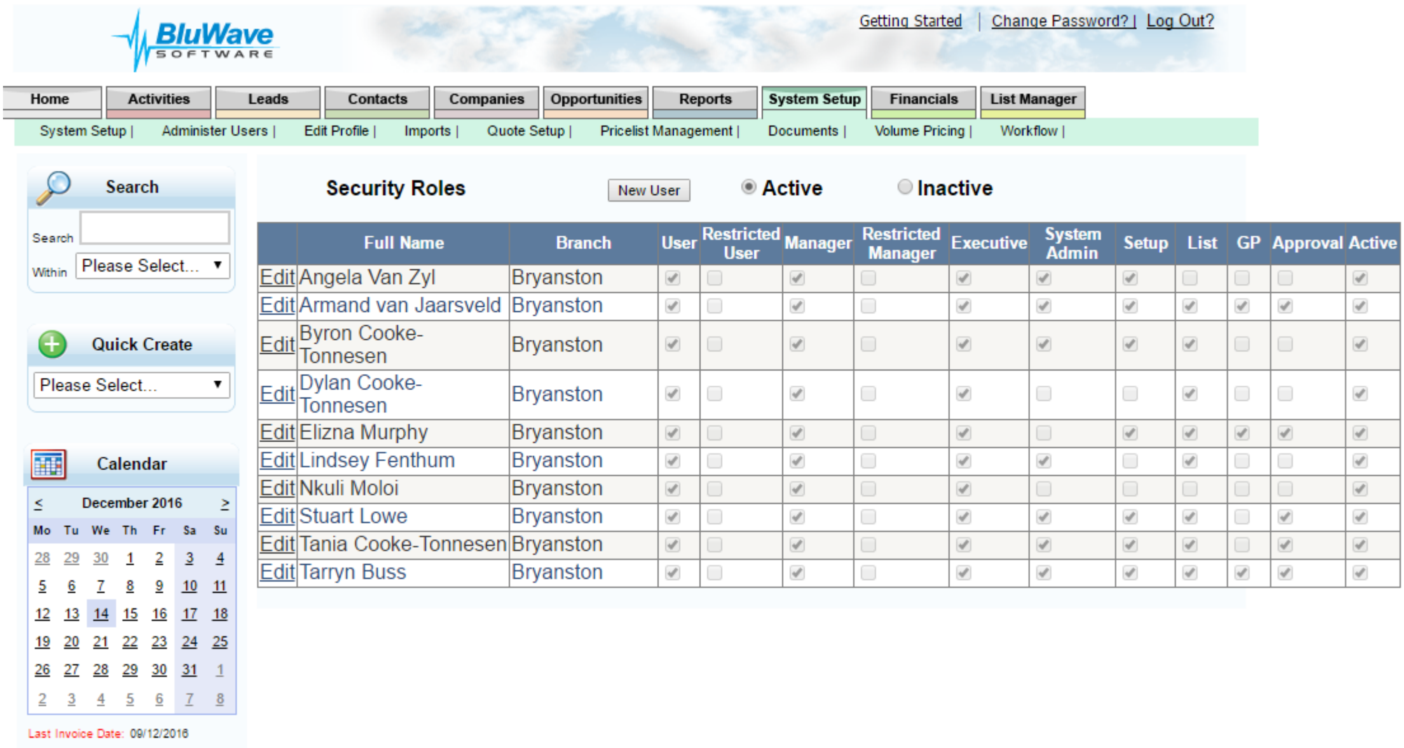
Edit branches by selecting the branches option from the dropdown list of set up items on the **System Setup** menu. Use the branches option to define the branches that your sales team is assigned to in your organisation.

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



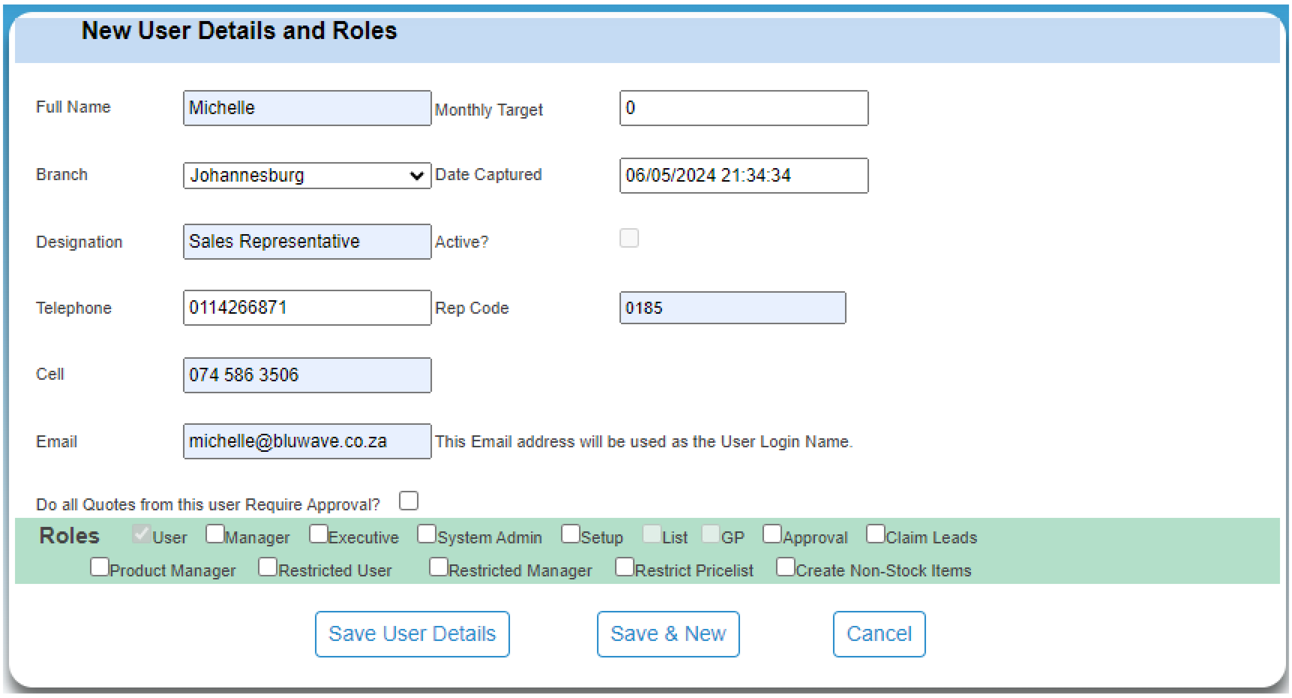
	Full Name	Branch	User	Restricted User	Manager	Restricted Manager	Executive	System Admin	Setup	List	GP	Approval	Active
Edit	Angela Van Zyl	Bryanston	✓		✓		✓	✓	✓				✓
Edit	Armand van Jaarsveld	Bryanston	✓		✓		✓	✓	✓	✓	✓	✓	✓
Edit	Byron Cooke-Tonnesen	Bryanston	✓		✓		✓	✓	✓	✓			✓
Edit	Dylan Cooke-Tonnesen	Bryanston	✓		✓		✓			✓			✓
Edit	Elizna Murphy	Bryanston	✓		✓		✓		✓	✓	✓	✓	✓
Edit	Lindsey Fenthum	Bryanston	✓		✓		✓	✓		✓			✓
Edit	Nkuli Moloi	Bryanston	✓		✓		✓						✓
Edit	Stuart Lowe	Bryanston	✓		✓		✓	✓	✓	✓		✓	✓
Edit	Tania Cooke-Tonnesen	Bryanston	✓		✓		✓	✓	✓	✓		✓	✓
Edit	Tarryn Buss	Bryanston	✓		✓		✓	✓	✓	✓	✓	✓	✓

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** menu.
Click on the **Administer Users** menu underneath.

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 later in this document.

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).

The number of licences bought will be the limit to the number of Active Users allowed on the system. However, any number of inactive users can be added to the system. These could be people within your processes that need to receive updates or notifications from the system or be included in meeting requests or people that have previously worked for the organizations but have since left.

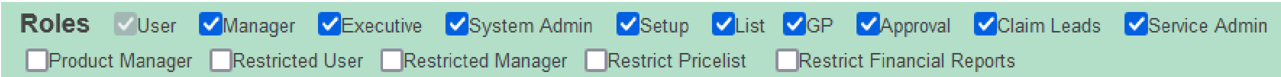
Suggestions: Whenever a user leave, it is best to deactivate that profile and create a completely new profile for whoever replaces them. This will ensure reporting and data accuracy- meaning when having to look at the history, the system can accurately show which user did what on the system.
If needed, a support call can be logged with us to move any of the below from the deactivated user to the new user when necessary:

- Assigned Companies
- Open Activities
- Open Opportunities

The rest of the data (history) will then accurately reflect on the correct user.

5. Security Roles

The security roles in Bluwave build on top of each other.
Coincidentally, the top line of the roles grants users additional abilities, while the bottom line restricts some of their existing ones.



Examples of role combinations:
A Salesperson who should only access their own assigned clients will be assigned the User role. However, a Salesperson who can sell across the customer database but shouldn't edit another salesperson's entries will be assigned the Product Manager role.

Try to limit the number of users who have System Admin, Setup and List rights as these could lead to people changing the system with no understanding of what effects the changes might have, extracting customer lists and information or removing important/ historical information from the system.

Our suggestion is to rather give less rights and add more later that start the users off with too much access/rights.

5.1 Summary of Security Roles

5.1.1 Basic System Rights:

Users	Can View, Add, Edit and Delete their OWN Leads, Companies, Cycles, Activities, Opportunities. They can also see the other users' companies within their branch but cannot access it.
Product Manager	Can View and Add All Leads, Companies, Cycles, Activities, Opportunities and Current Products across all branches. Can Edit and Delete their own entries only.
Manager	Can View, Add and Edit Leads, Companies, Cycles, Activities, Opportunities and Current Products on behalf of other users within the same branch. Can Delete their own entries only. They can also see the other users' companies in the other branches but cannot access it.
Executive	Can View, Add and Edit All Leads, Companies, Cycles, Activities, Opportunities and Current Products across all branches. Can Delete their own entries only.

5.1.2 Additional Rights:

System Admin **	Needs to accompany Executive rights. Can View, Add, Edit and Delete All Leads, Companies, Cycles, Activities, Opportunities and Current Products across all branches.
Setup **	Enables the ability to configure the system's setup.
List **	Enables the ability to export data from the system into excel.
GP	Enables the ability to view the Gross Profit across the system.
Approval	Enables the ability to approve quotes before it is sent to the clients.
Claim Leads	Enables the ability to view and claim unclaimed leads.

** The rights should only be assigned when necessary. These rights allow for data extraction/ manipulation.

5.1.3 Restrictive Rights:

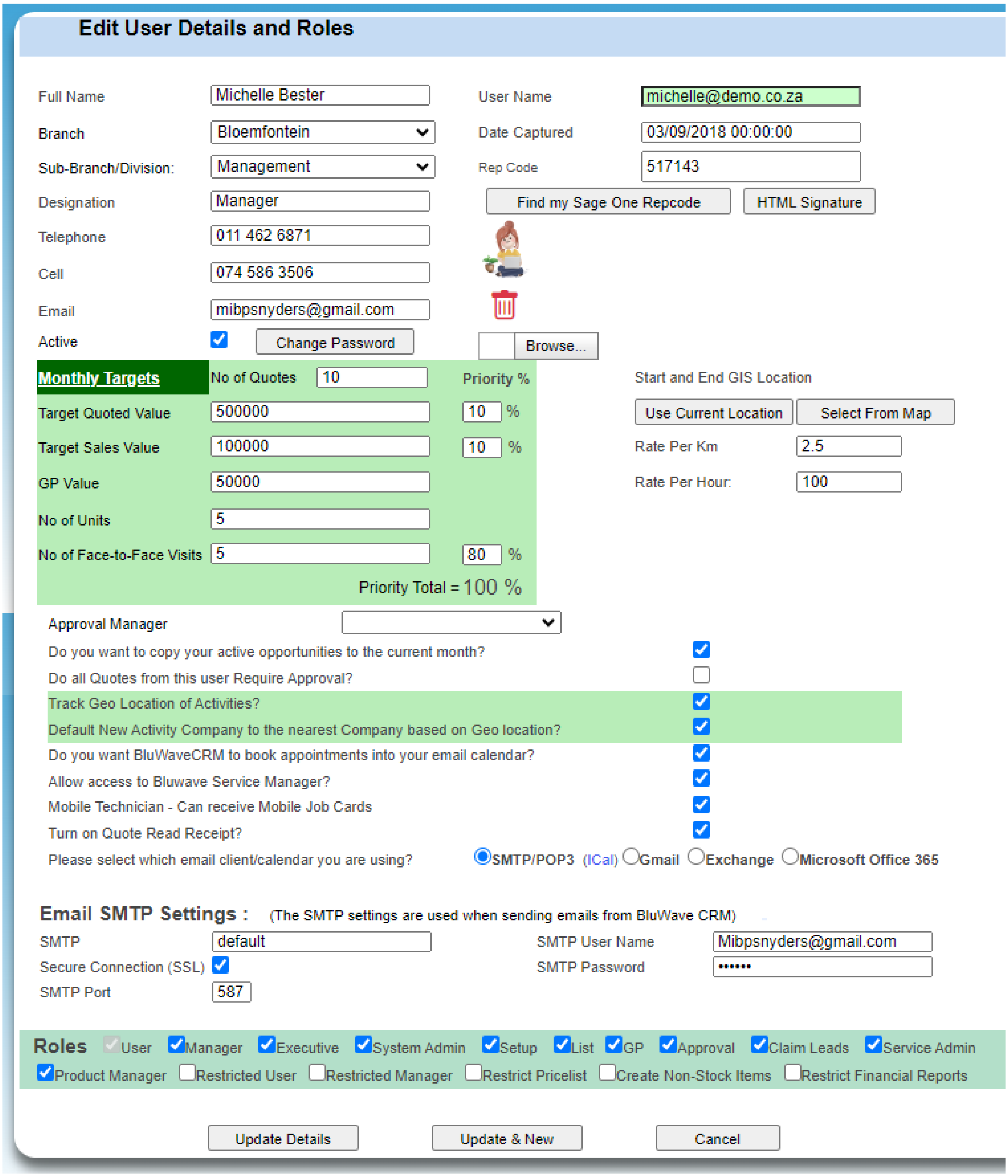
Restricted User	Removes the viewing ability of the user to see the other users' companies within their branch.
Product Manager	Can View and Add All Leads, Companies, Cycles, Activities, Opportunities and Current Products across all branches. Can Edit and Delete their own entries only.
Restrict Pricelist	Enables the ability to restrict pricelist usage and allocate which users can use which pricelists.
Restrict Financial Reports	Users won't be able to access the following reports on Bluwave. • Sales vs Budget Reports • Sales per Financial Year Report • Sales Ladder Report • Forecast vs Actuals Variance Reports • Forecast Vs Actuals Graph • Forecast By Product Reports

6. 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** menu or from the **User Profile** option from avatar bubble.

6.1 Activate or De-activate a user

Should a user leave the company you can deactivate their account by deselecting the **Active** checkbox – you will then have another license available to create your new user. Licenses aren't linked to a specific person, but rather to the number of active users allowed on the System. (Please Note: If a user leaves the company, rather deactivate the user, than simply changing the user's details. The trail of accountability will be lost if the user's details are just changed)



6.2 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.

6.3 Change Password

To change the users BluWave Login password, Click on the **Change Password Button**.

6.4 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.

6.5 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 needs to complete during the month.

6.6 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 number of kilometres driven out per month on the Travel Claim Report.

6.7 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.

Please let us know if you are connecting to the Sage Business Cloud (Sage One) accounting package. As you would need to setup that integration first and then make sure to load all your users before day end. (see Heading 36 later in this manual)

6.8 Approval Manager

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

6.9 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.

6.10 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.

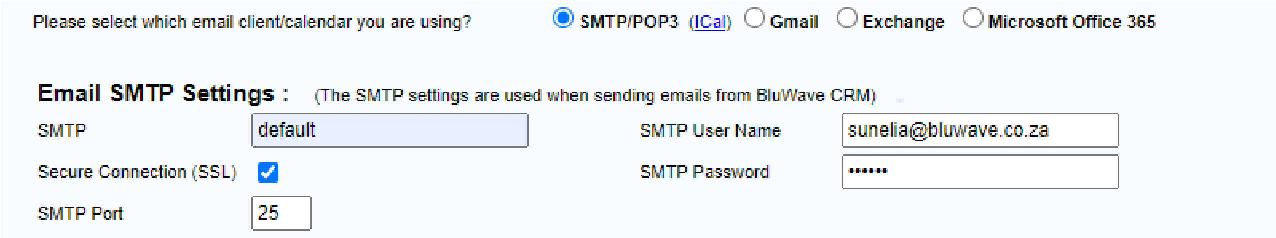
***Please also make sure to always update this password if the email password is changed.**

We have made provision for the Following email client settings-

1. SMTP/ 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:

6.10.1 Pop3 & Imap

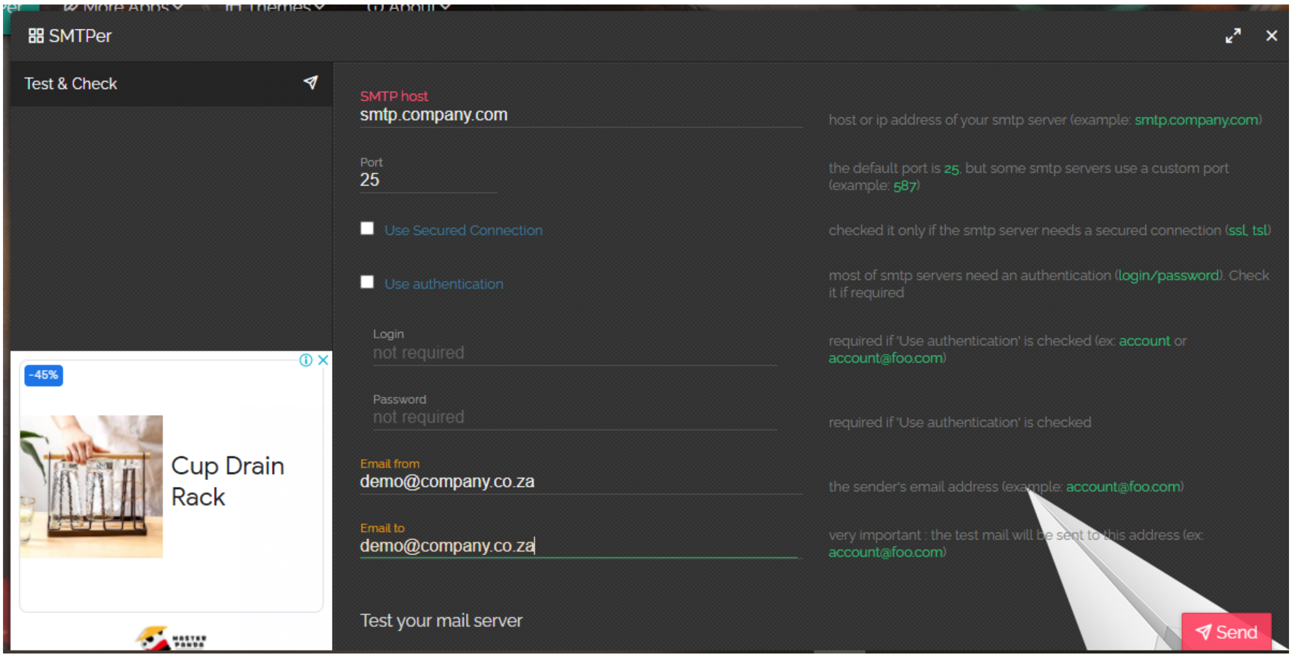


You ISP should be able to provide you with this information.
If you leave the SMTP field to “default”- the email will send using the Bluwave Server SMTP.

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.

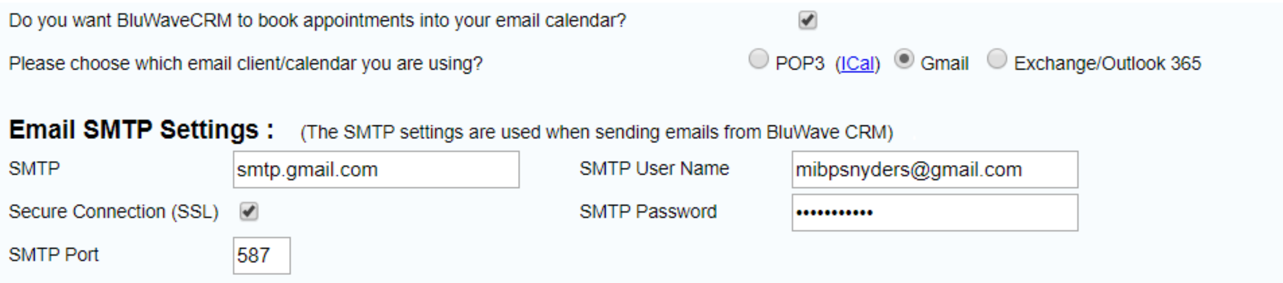
6.10.1.1 Confirming that the Username and Password for SMTP settings for POP3 are correct, by following these steps:

1. Open a new menu within your browser (usually this can be done by clicking on a **Plus icon** next to the existing menus).
2. Copy and paste the following link in the URL bar and press Enter on the keyboard- https://www.smtper.net/
3. Type in the email setting details and click on the **Send** button:



If you are able to receive the email from the credentials entered on the screen, then they are correct.

6.10.2 Gmail



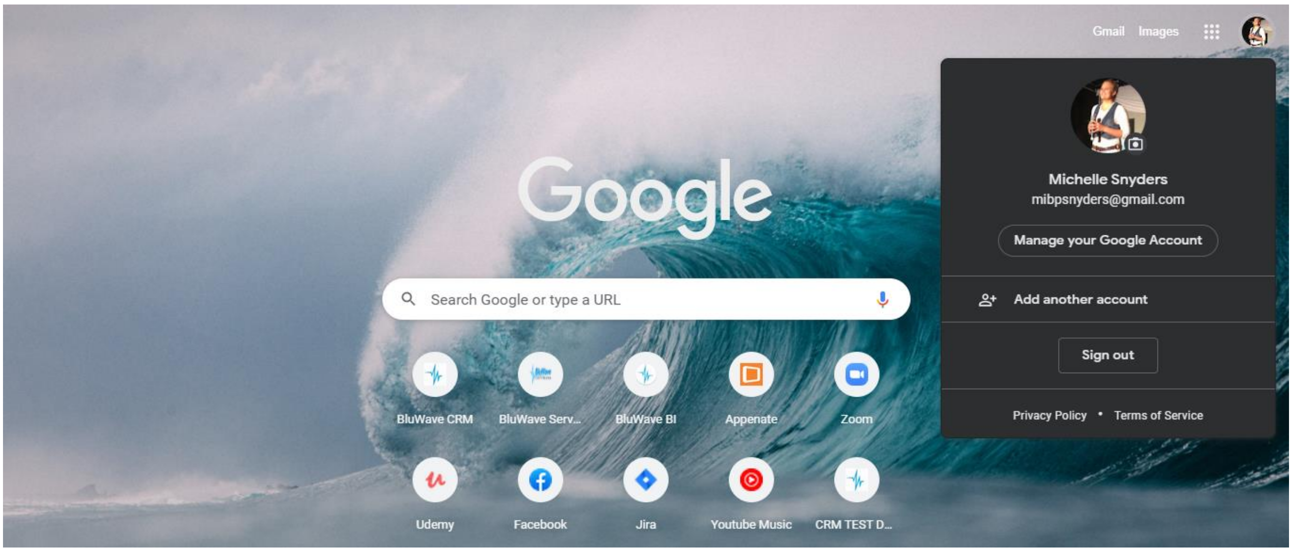
The port will always be 587 and the SSL will need to be ticked.

Because of recent security changes, the SMTP Password field would not be filled in by the Gmail Password but rather an ***App Password***. Please follow the steps below to create the app password.

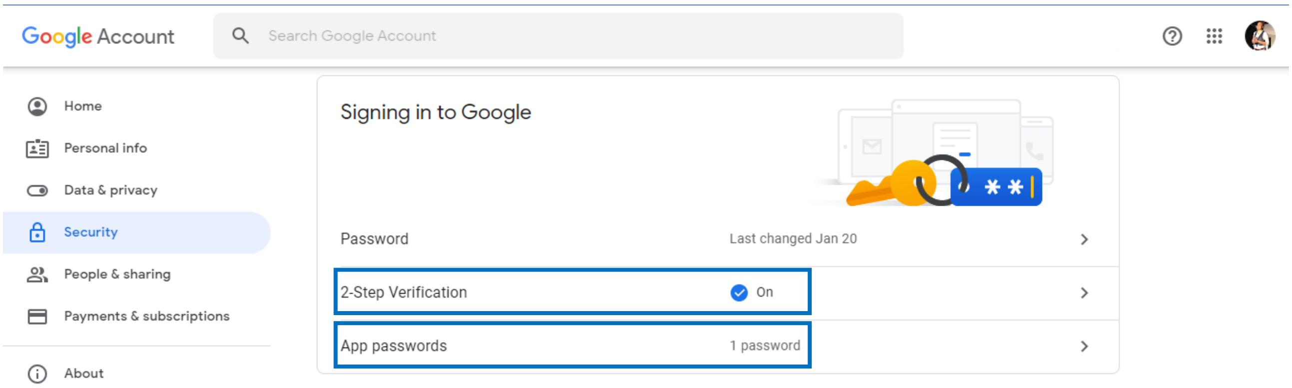
6.10.2.1 Gmail and App Passwords

To ensure the connection between Bluwave and Gmail accounts integrates smoothly, the users would need to create an App Password to fill into their profile on BluWave.

Go to **Manage Your Google Account.**

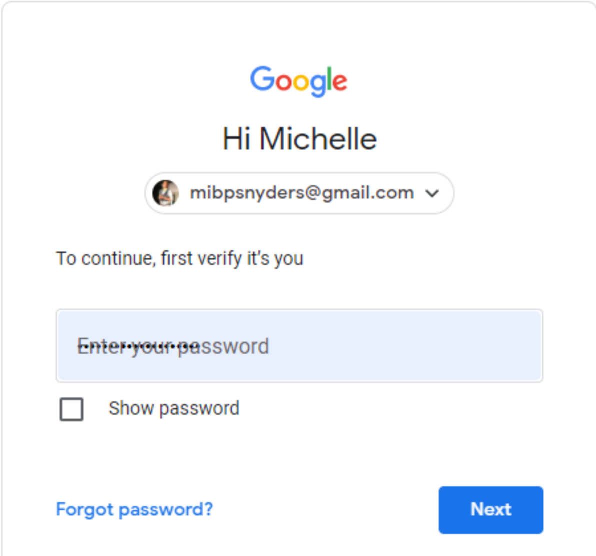


Go to the **Security** Section and scroll down to the **Signing in to Google** panel.



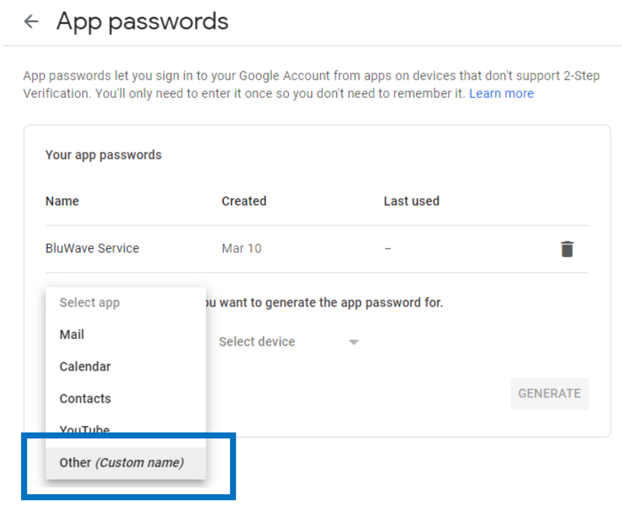
Ensure that the **2-Step Verification** option is turned **ON.**

Click on App Passwords and follow the verification process.

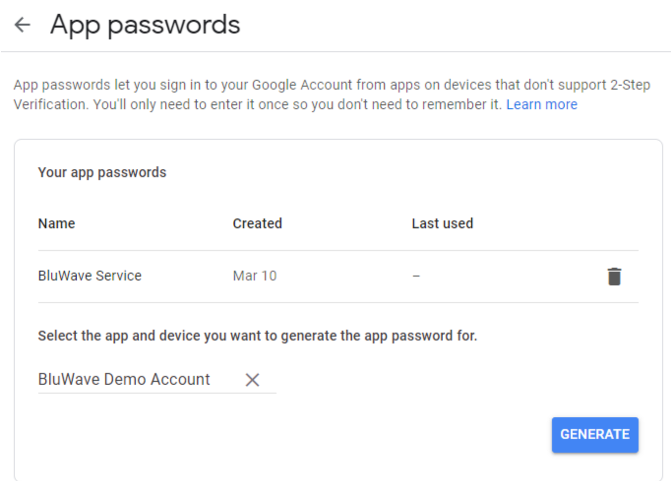


On the App Passwords Page, you can add an App and Device you would like to generate an App Password for:

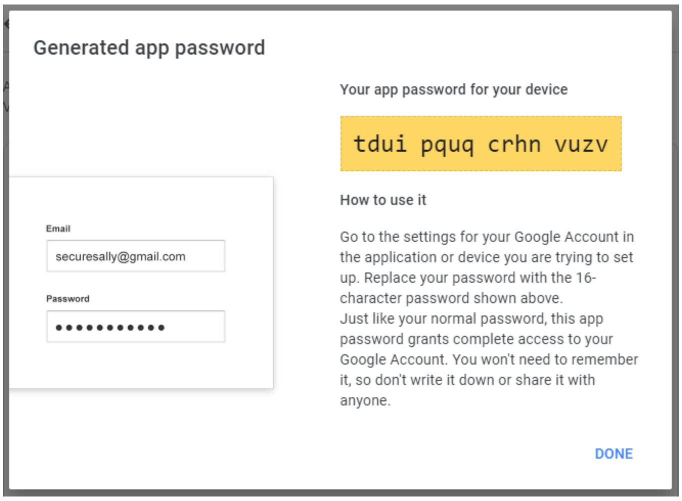
- Select App: Select **Other** and Type in a name i.e. BluWave Software



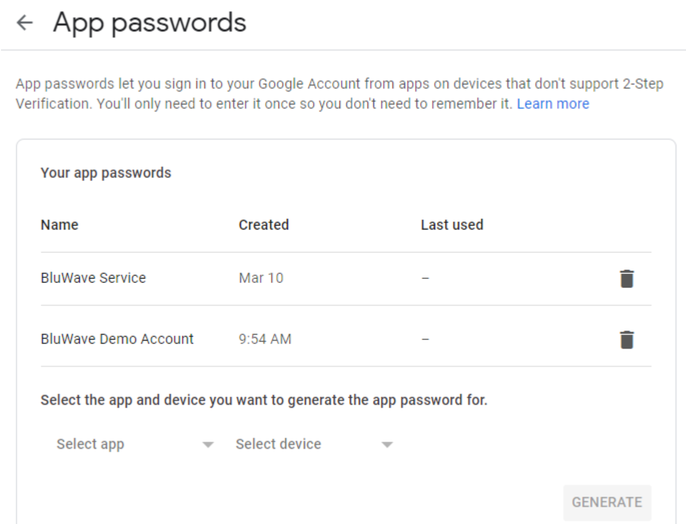
- Click on the Generate Button



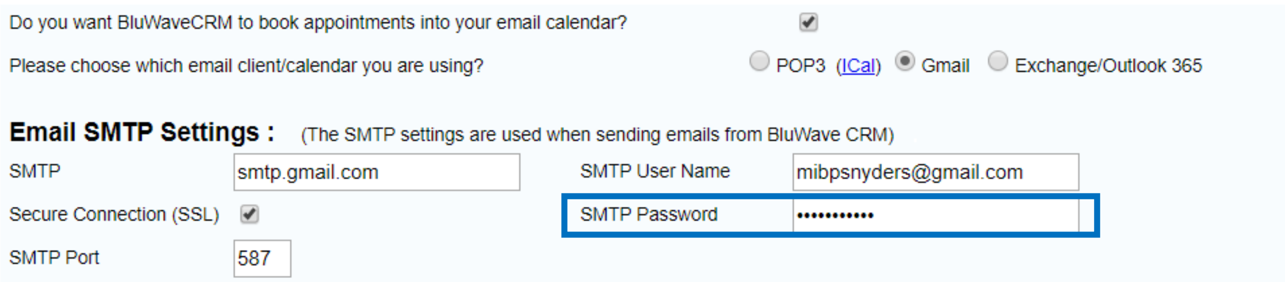
- The Generated Passwords would show. Make sure to copy this password and paste it into the SMTP Password field in your BluWave User Profile.



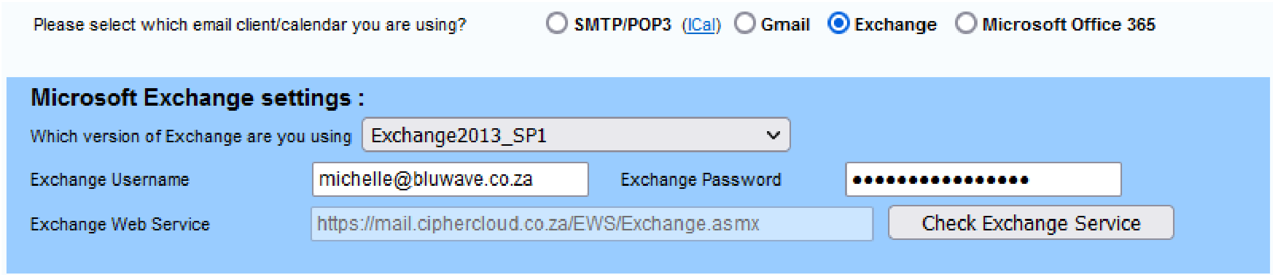
Once an App Password is generated you would not be able to see it again. If you lose or forget the password, you will need to delete the line and generate a new password. Remember to update Bluwave accordingly.



- Now return to BluWave and insert the generated **App Password** into the **SMTP Password field**.



6.10.3 Exchange

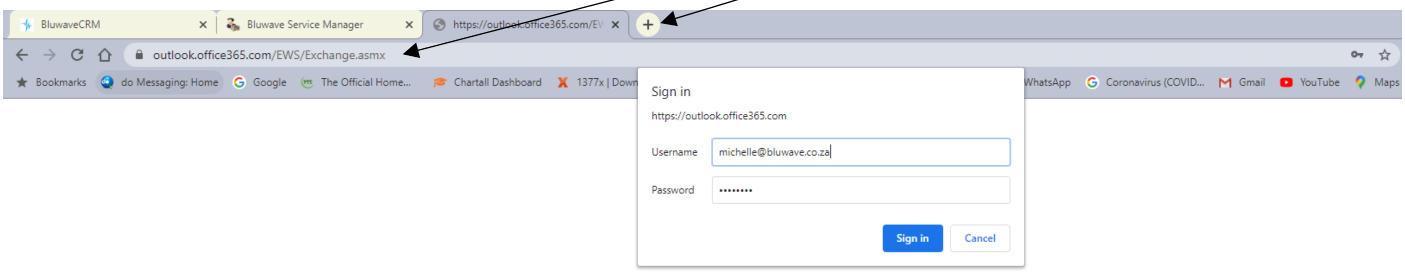


For Exchange users the Exchange Admin would need to ensure that the *Autodiscover* is set to on.

6.10.3.1 Confirming that the Username and Password for Exchange and Office 365 are correct:

The main reason why the integration with Exchange or Office 365 might not work could be that the username and password is entered incorrectly.

It would be best to check these details by following these steps:
Open a new menu within your browser (usually this can be done by clicking on a **Plus icon** next to the existing menus) and copy the Exchange Web Service into the **URL bar** and press **Enter** on the keyboard.



Once the **Enter Key** is pressed, the browser will search for the URL and a Sign In pop-up will appear.

Type in the relevant Username and Password and click on the **Sign In button**.

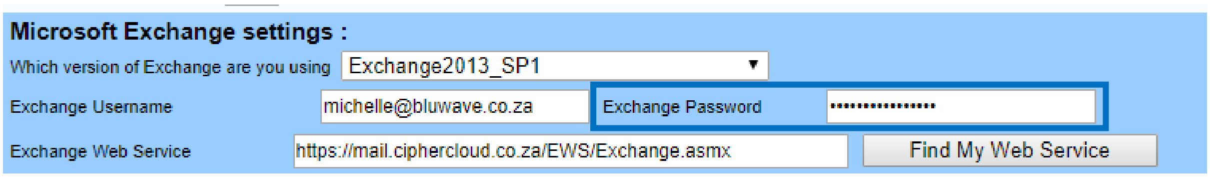
- If the details are **Correct** the pop-up will disappear and show a page with wording that looks like coding- the user could ignore this and simply close the menu.
- If the details are **Incorrect** the pop-up will re-appear again for the user to re-enter their details.

6.10.3.2 Multi-Factor Authentication

Some Exchange administrators might have enabled the additional security of Multi-Factor Authentication, where it not only requires the user to have an exchange password, but instead use an App password specifically generated for BluWave CRM/Service.

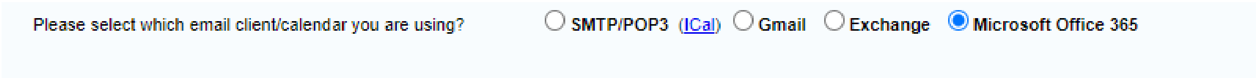
If this is the case, please contact your Exchange administrator for more information and assistance in the creation of the App Password that needs to be added to the User profile within BluWave CRM/ Service.

In the blue section, ensure the user has the correct version of exchange selected, entered the username and app password in the exchange password field as well as the correct exchange web service address.



The user can then click on the **Update Details button** at the bottom of the page in BluWave to save the details. (Remember to log out and back in for the settings to take affect).

6.10.4 Office 365

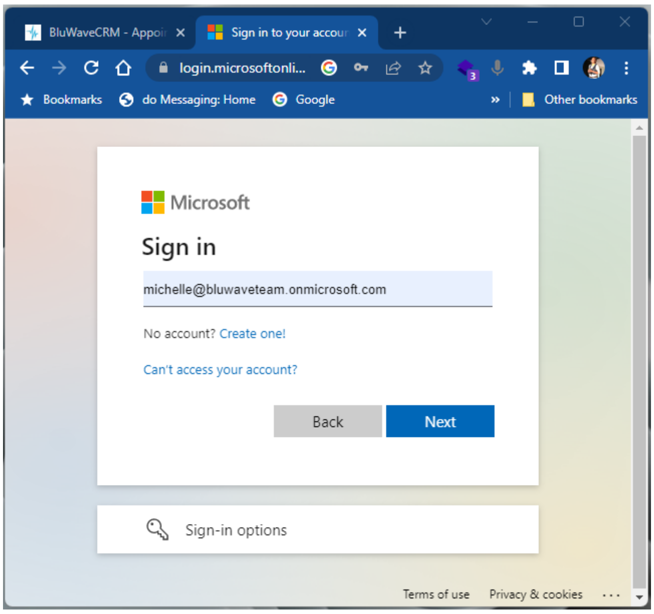


For Office 365 users, they would select the Microsoft Office 365 radio button at the bottom of their user profile within Bluwave CRM and then click on the **Update Details button** at the bottom of the page in BluWave to save the details. (Remember to log out and back in for the settings to take affect).

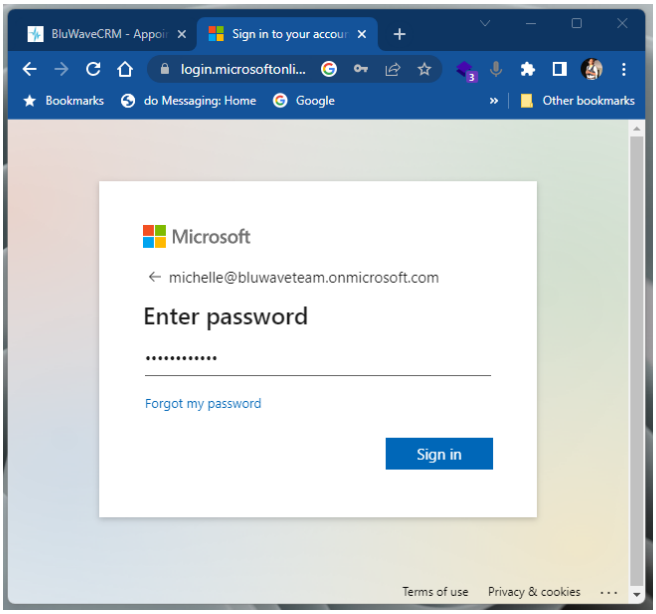
Once the user has logged back into BluWave CRM, the easiest way would be to try and send themselves an email using the Quick Create link to the left of the screen. (Please note that each user would need to do this for themselves, and administrators cannot do this on behalf of the users).

Once the user clicks on the **Send** button, another screen will pop up asking them to log into their Office 365 accounts.

On the Microsoft Sign in page, fill in your Microsoft 365 account username and click on the **Next** button. This would usually be your email address.

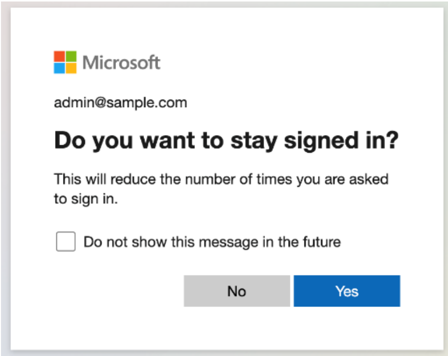


Enter your Microsoft 365 account password and click on the **Sign In** Button



Once you have clicked on the **Sign In** button, Microsoft will bring up another question asking if you wish to stay signed in (for this specific device) and not have to log in again.

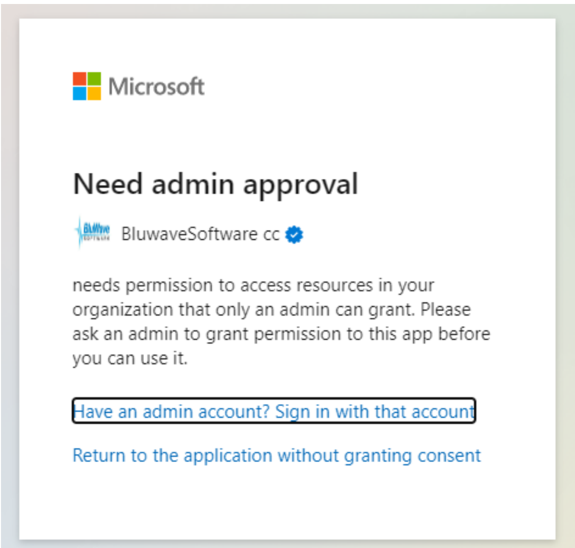
The user can then choose to select yes or No.



Now that the user has signed into their Microsoft 365 account, they can return to Bluwave. The email should now have sent to the recipient they typed in.

6.10.1.1 Additional Office 365 Security

Certain organizations might have additional security settings enable on their accounts, where the administrator will need to provide approval before the user can sign into their Office 365 accounts- please contact your IT consultants for further assistance in this instance.



6.10.5 IP Addresses to Whitelist

In some cases, POP email users may experience email failures due to spoofing.
As Bluwave is an online SAAS app – we use SMTP servers to send emails on the user's behalf.
In other cases, users may send via their own SMTP server.
Sometimes these emails are not received due to SPF settings and security settings.

As a result, you need to whitelist certain IP addresses.
Speak to your email ISP to assist in whitelisting these addresses.

The Bluwave IPs you need to whitelist for emailing are:

- 197.234.137.10
- 41.87.207.238
- 41.87.207.12
- 154.0.166.173

6.11 Settings only System Admin can change

- **Roles** - Indicates the access levels of users
- **Branch**- Indicates the branch the salesperson 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

Opportunities Section

7. 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

The Opportunity Statuses will also be applied to the Prospect Status field on the Edit Company page. As a prospect need to go through the initial sales process to become a customer.

8. Reasons Lost

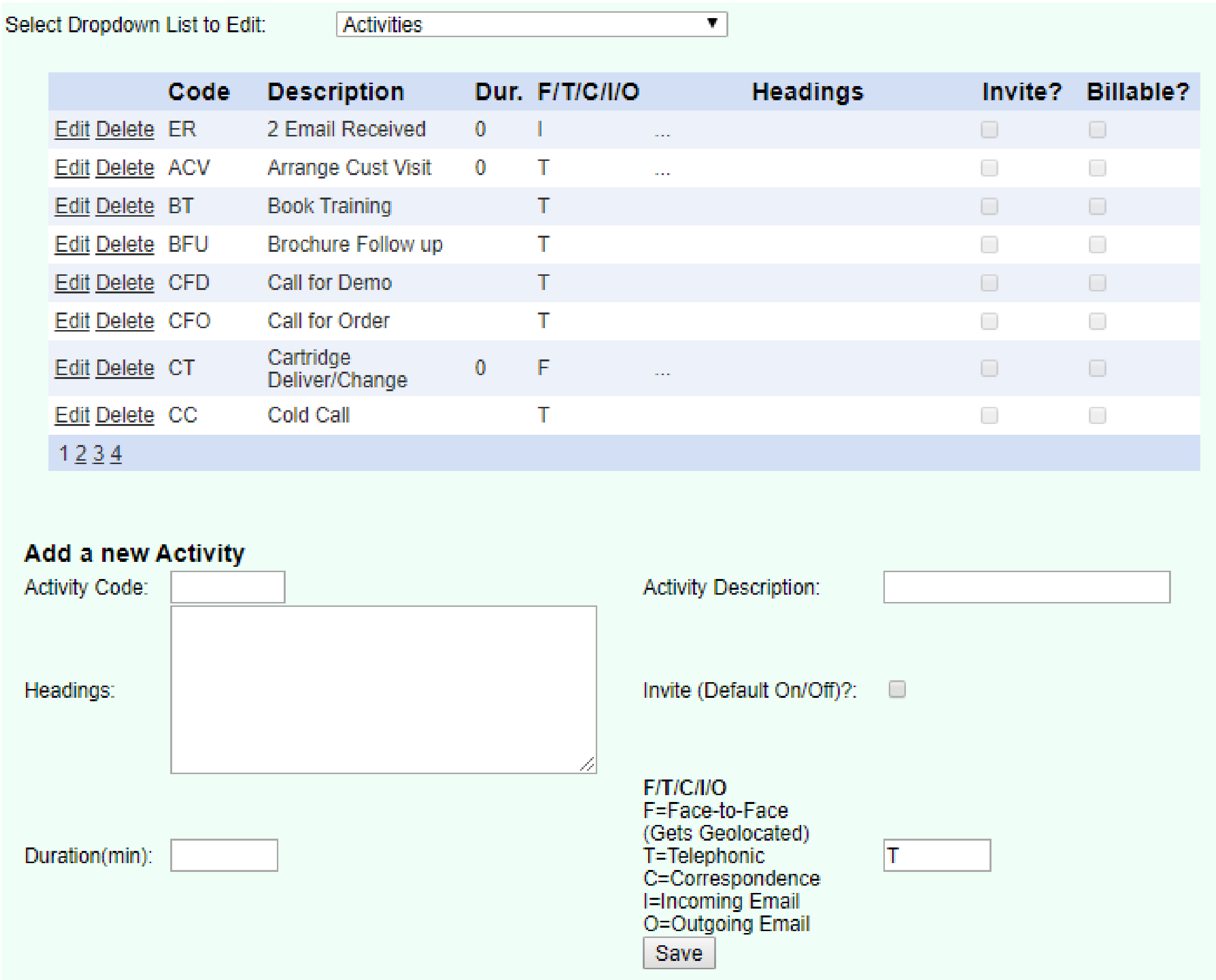
If a sale is lost/ decided not to buy, the system will ask for a reason lost. Enter a list of the common reasons e.g. product features, delivery period, price too high etc. (Opportunities can be closed without a reason)

9. Competitor 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.

Activities Section

10. Activities


Select Dropdown List to Edit: Activities

	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:
Activity Description:
Headings:
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 Activity 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.

Companies Section

11. Customer & Prospect Types

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

This helps when deciding what amount of effort, the client would be worth or what newsletters to send to what type of client.

For example, in levels of the potential revenue or actual revenue the client could accrue per annum, you could decide to assign the client to a gold or Diamond level.

The Prospect Type list will also be applied to the Lead Type Field on the Add/Edit Leads page.

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 salespeople 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. 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.

18. Pricelists

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

19. 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).

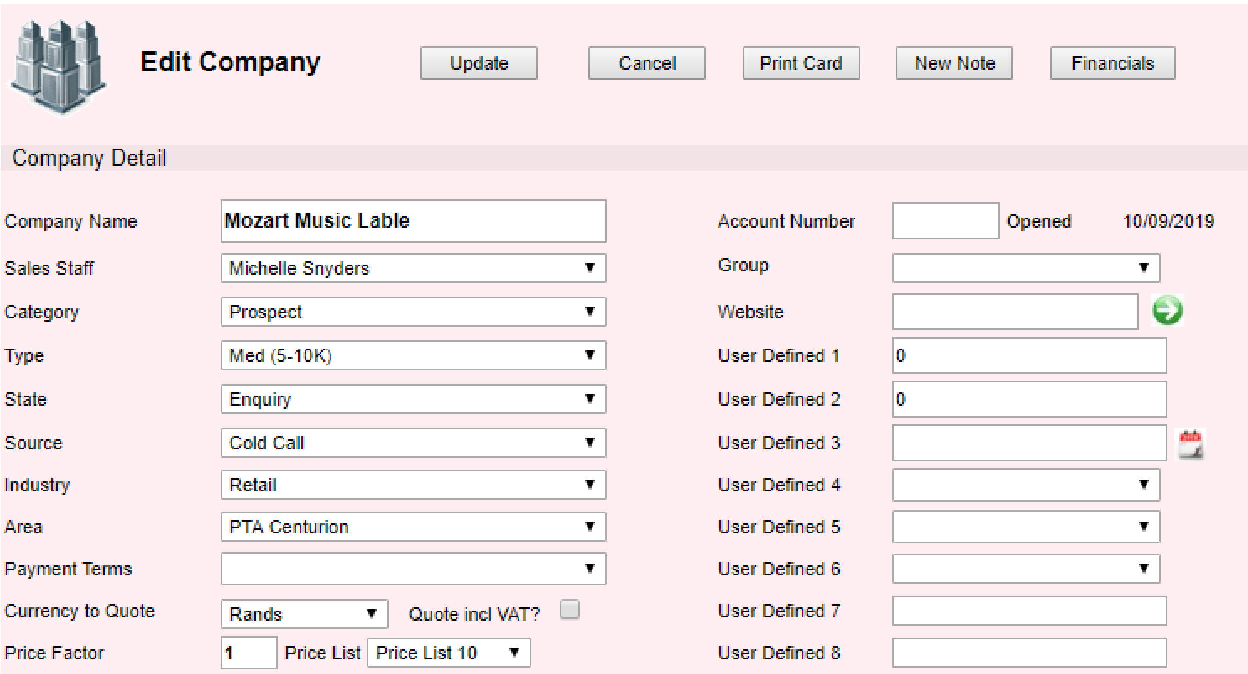
20. User-Defined Fields Client Data Items

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

There are 8 user defined fields on the Edit Company page.

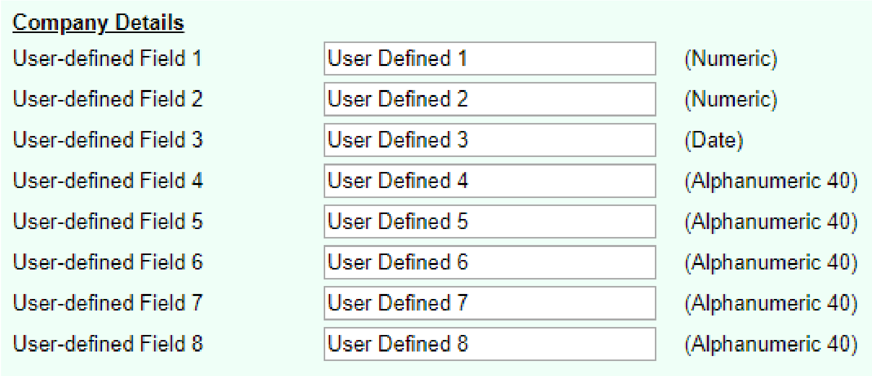
20.1 Company Screen

On the Company Screen there are 8 user defined fields that the user can customize to their requirements. (These User Defined Fields will also show on the Add and Edit Leads page)



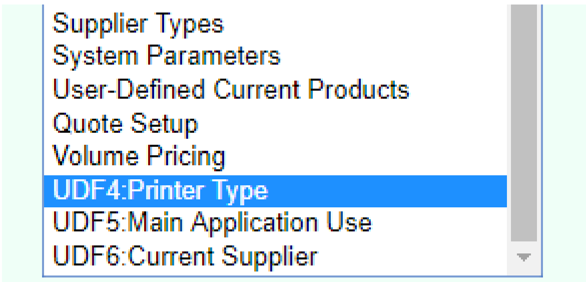
- **User Defined Field 1 & 2** – only numeric values will be accepted
- **User Defined Field 3** – only a date value will be accepted (there is a little calendar icon to assist in adding the date value)
- **User Defined Field 4, 5 & 6** – these are dropdown fields that can be populated, and the users 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

These fields can be renamed in the **System Setup** menu, 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 here.

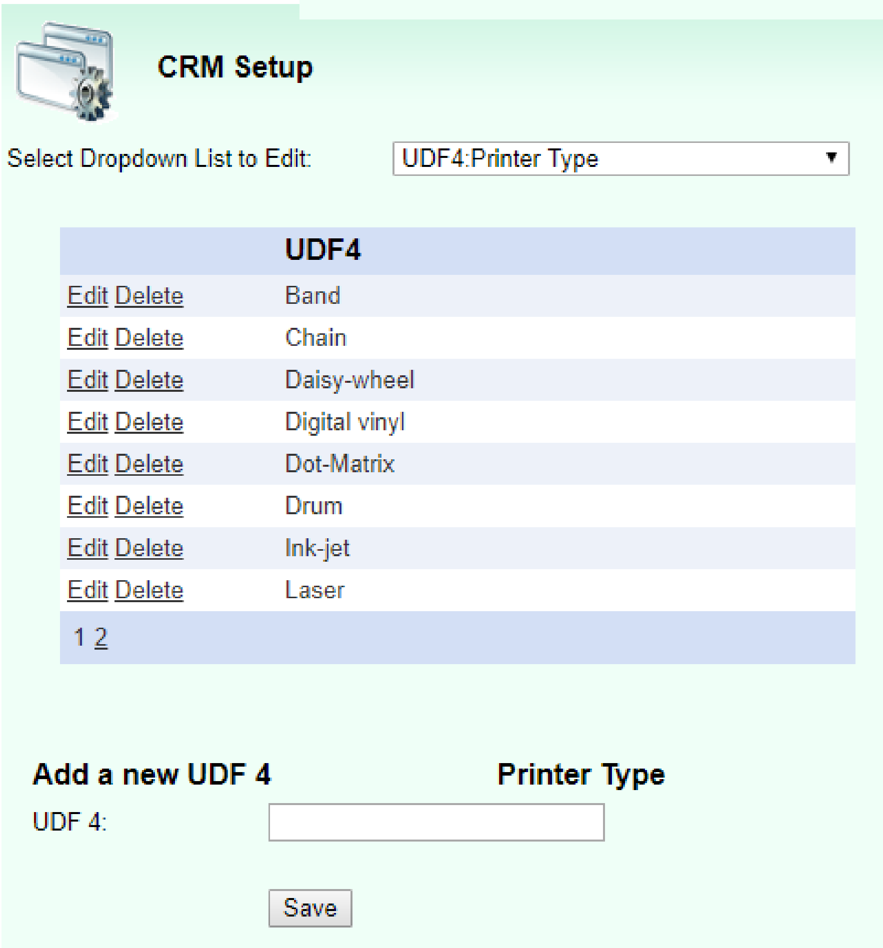
After the fields have been named, the dropdown fields (UDF 4-6) should then be populated to give the users the options to choose from.



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.



Leads Section

On the leads page, the lead type, source, industries, and user defined fields all pull through from the lists setup in the **Companies Section.**

21. 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.

Contacts Section

22. 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.

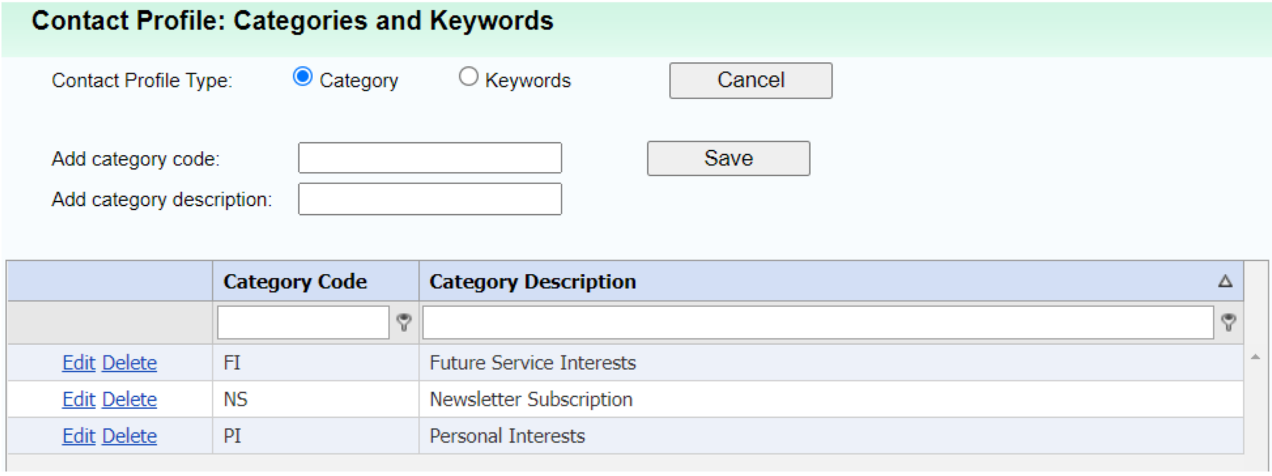
23. Countries

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.

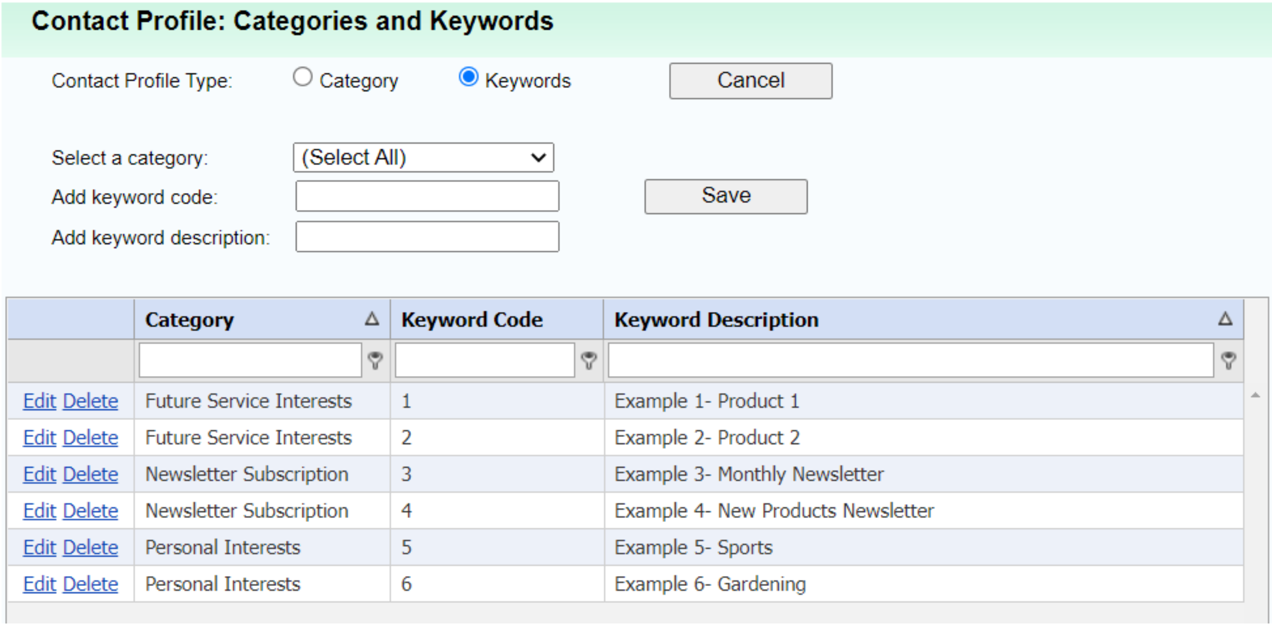
24. Contact Profile Categories and Keywords

Further categorizing of the contacts can be achieved by adding profiles to each contact by selecting from a list of keywords. To set up these keywords, start by adding Categories and then Keywords to each category.

Categories:



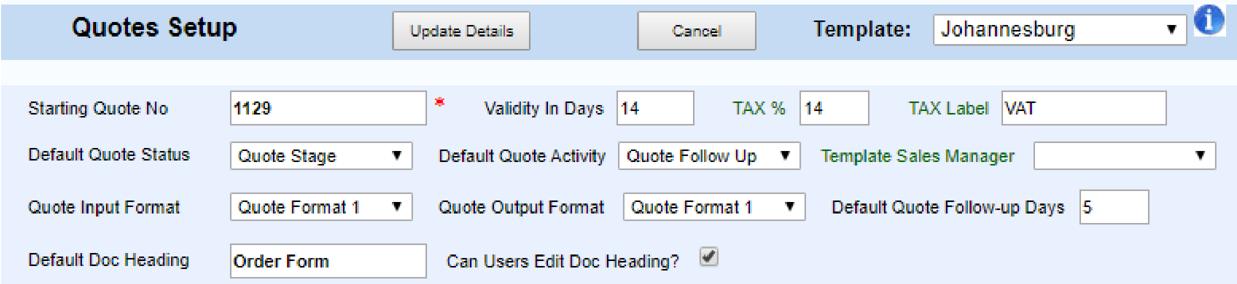
Keywords:



Quotes Section

25. Configuring The Quote Setup Area

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



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 **green** can be set up per template/branch.

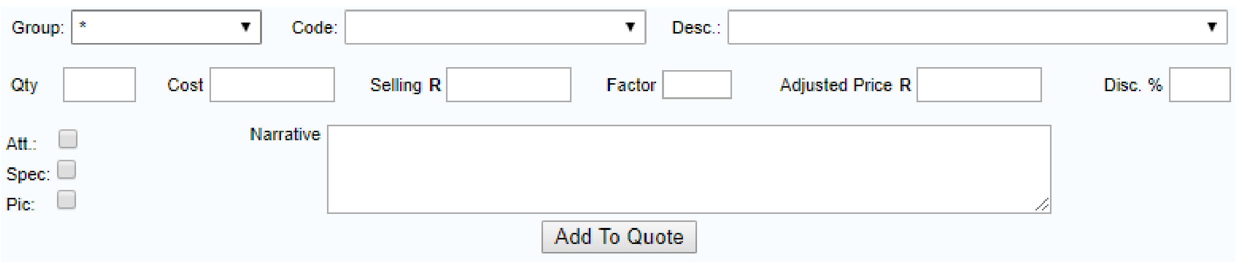
To choose which template (branch) to set up, choose the applicable template from the dropdown field at the top right corner.

Follow the steps below to help you configure your quotes:

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

The system allows for 4 different types of inputs to add the information per product on the quote.

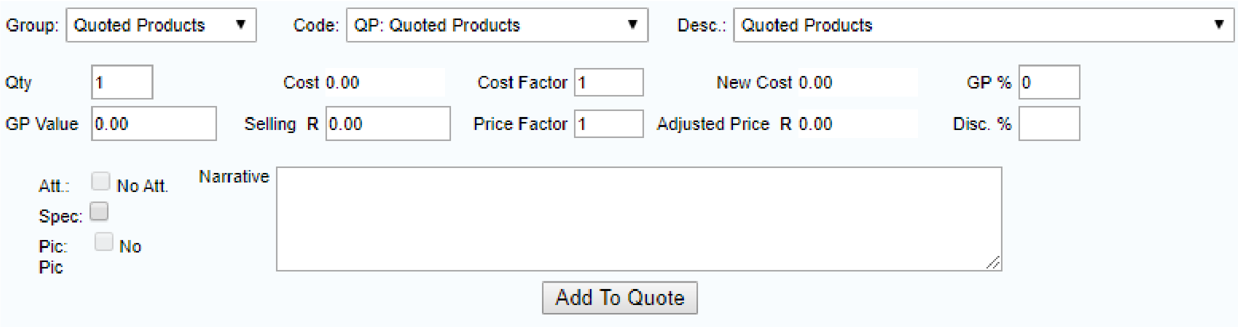
Quote Input Format 1: Requires a selling price and has a factor or discount.



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

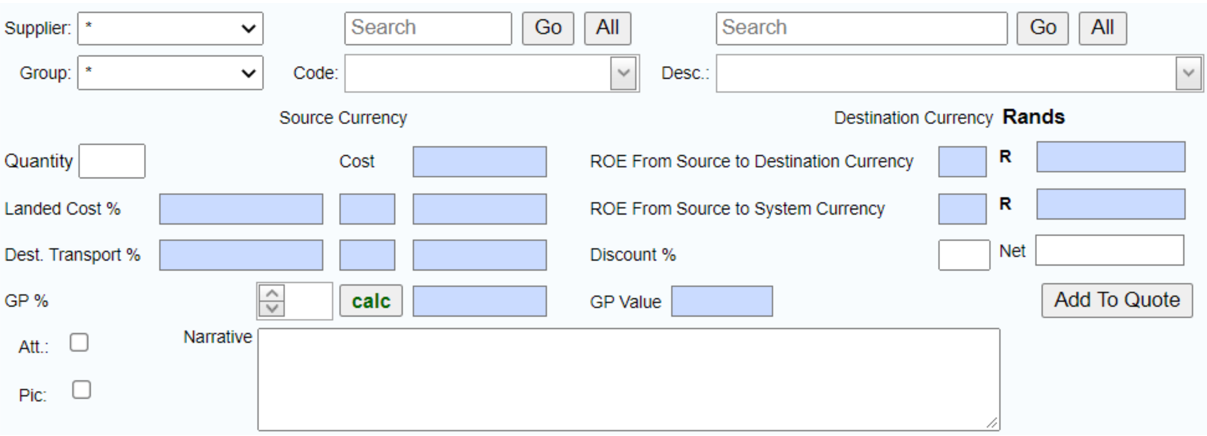
- Enter base cost price in Rands.
- Enter a factor to increase the cost for say transport cost and import duties. This factor can be set up in BluWave as a default per product group. The factor can also be defaulted from the company screen. So, if for example a customer should pay 5% percent more as 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.

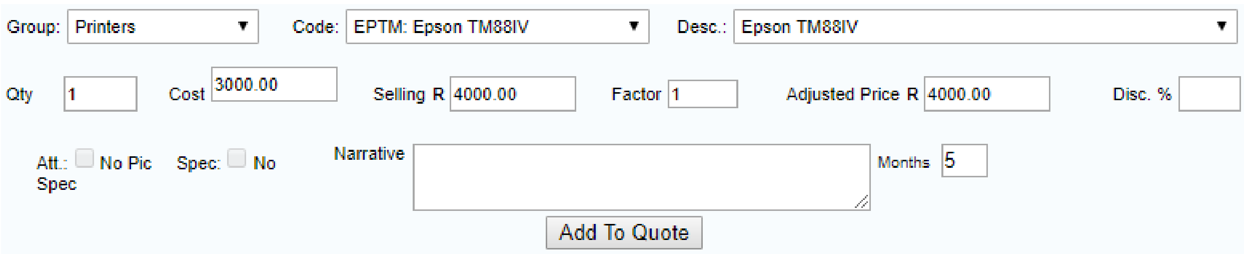


Quote Input Format 3: This input format uses a more complex process for the calculation of a products selling price. To use this input format, please request the Multiple Currency Pricelists and Quotes manual from us. There would be additional fields that need to be populated before the reps would be able to quote using this input format. The selling price is calculated for reps based on the setup settings and cannot be edited by the reps.
***The blue fields cannot be edited by the reps.**

- Enter Quantity.
- Leave the GP % as is or increase/ decrease the GP %.
- Enter either a discount % or net value (which will calculate the discount %)



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.



25.2 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.
(Please see the Appendix Section for Examples of the Quote Outputs)

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

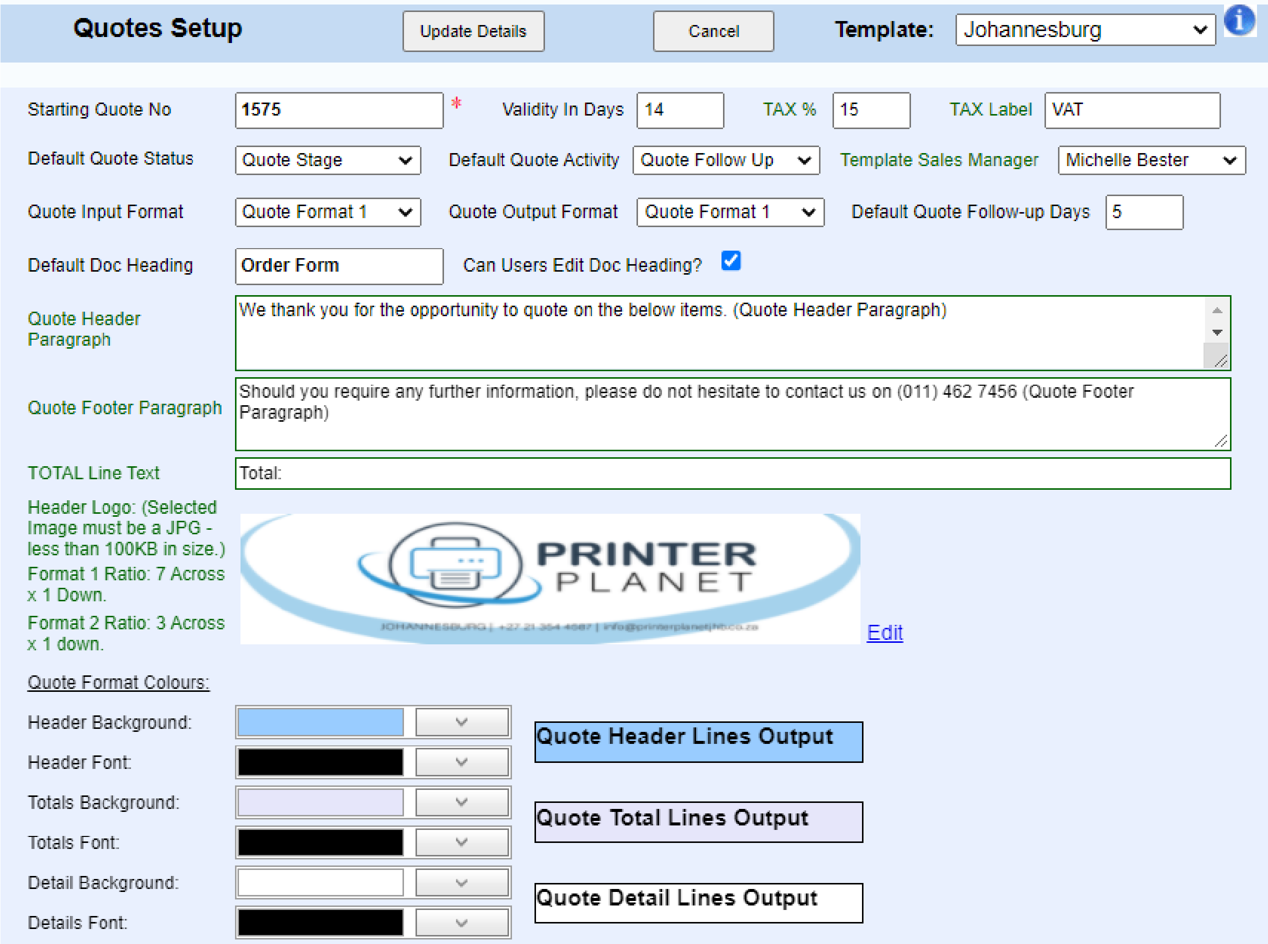
Quote Output Format 2: Longer quote. Will display a picture before the offer of the first quoted product, if attached.
The Sections included are (in order):

- 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
- Quote Footer Paragraph
- Sales Rep Details
- Offers (On the next page)
- Summary of Proposal (if selected)
- Terms & Conditions

25.3 Step 3: Add in the first Section of Settings



Starting Quote 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.

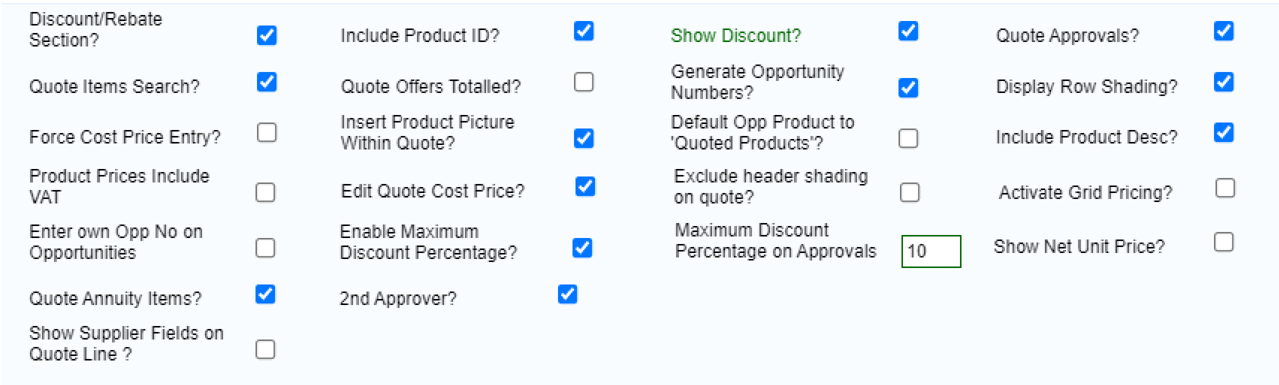
Quote Header Paragraph/ Quote Footer Paragraph: Use this text fields to enter text that will appear on top and bottom of your quote. A good example is shown in the image above.

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.

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

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



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.

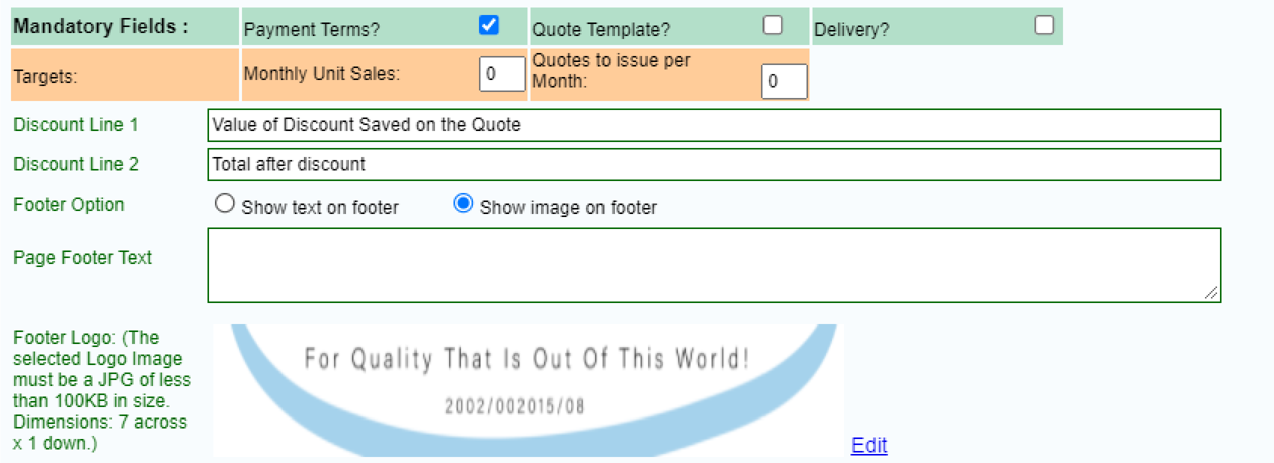
Show Supplier Fields on Quote Line?: enabling this will show 2 additional fields on the quote line for the reps to add in supplier details. i.e., if they quoted using specific supplier pricing. These fields will not print on the quote output.

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.

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



Mandatory Fields:
- Payment Terms: This field must be populated 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.

25.6 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.

{QuotedExchangeRates}: (only applicable to unput 3) This will show all the various different currencies and exchange rates used in the calculations on the quote.

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.

26. Products

Products are used for opportunities and by the Quotes Automation function. Products either need to be:

- Imported into the Products table
- Or alternatively loaded to the system individually/ manually. (follow the order of the headings below for efficacy)

The fields that are required are the Product ID, Product Description, Product Group, a Narrative and Selling Price.
BluWave makes provision for a few types of pricing options:

1. A standard pricelist that has one cost and one selling price.
2. A multiple prices pricelist that has one cost price, but up to ten selling prices (this would need to be imported from a csv file).
3. Company specific Contract Pricing
4. Company Group Contract Pricing
5. Volume Pricing

Selling Prices that are added or imported can always be changed on a per quote basis.

If the users aren't supposed to see cost prices, the cost prices can be set 0. However, if management needs to see gross profit on their reports the cost price would need to be added to the system and it will be visible to the users.

26.1 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

26.2 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.

26.3 Products

Once the Product Group Categories and Product Groups have been set up, the individual products can be added to the system and assigned to a specific product group.

If a product is not assigned to a group, it would not be visible to the user to quote on.

26.4 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.

26.5 Special Pricing

26.5.1 Contract Pricing

This pricing would only apply to the specific company for a specific date range. This can be set up by:

- importing the relevant import format excel spreadsheet (in .CSV format) from **System Setup** menu and selecting the **Imports** option
- or by sending the relevant import format excel spreadsheet (in .CSV format) to: Importdata@bluwave.co.za with the Subject line: "**Import Contracts "**. This subject line needs to be added as is and not changed in any way, for the import process to be successful.

Viewing or deleting the contract pricing can be done by going to the **Companies** menu and selecting the **Contract Pricing** option.

26.5.2 Group Pricing

This pricing would apply to all the companies associated with a specific group. On the **Edit Company** page, the specific group would need to be selected.

- This can be set up individually by going to the **Companies** menu and selecting the **Group Pricing** option
- or by sending the relevant import format excel spreadsheet (in .CSV format) to: Importdata@bluwave.co.za with the Subject line: "**Import Group Contracts "**. This subject line needs to be added as is and not changed in any way, for the import process to be successful.

Viewing the group contract pricing can be done by going to the **Companies** menu and selecting the **Group Pricing** option.

27. Volume Pricing

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

Go to the **System Setup** menu and select the **Volume Pricing** option from the drop-down.

1. Start by clicking on the **Volume Breaks** button to set the unit quantities per break. (can only be set for up to 10 breaks/ranges). Click on the **Update Details** button once done and return to the previous page.
2. Once the breaks have been set it would apply to all products across the product list.
3. Next, select the item and add in the pricing per break. Products can be searched by **Product Code or Description**.

28. Restricted Pricelist

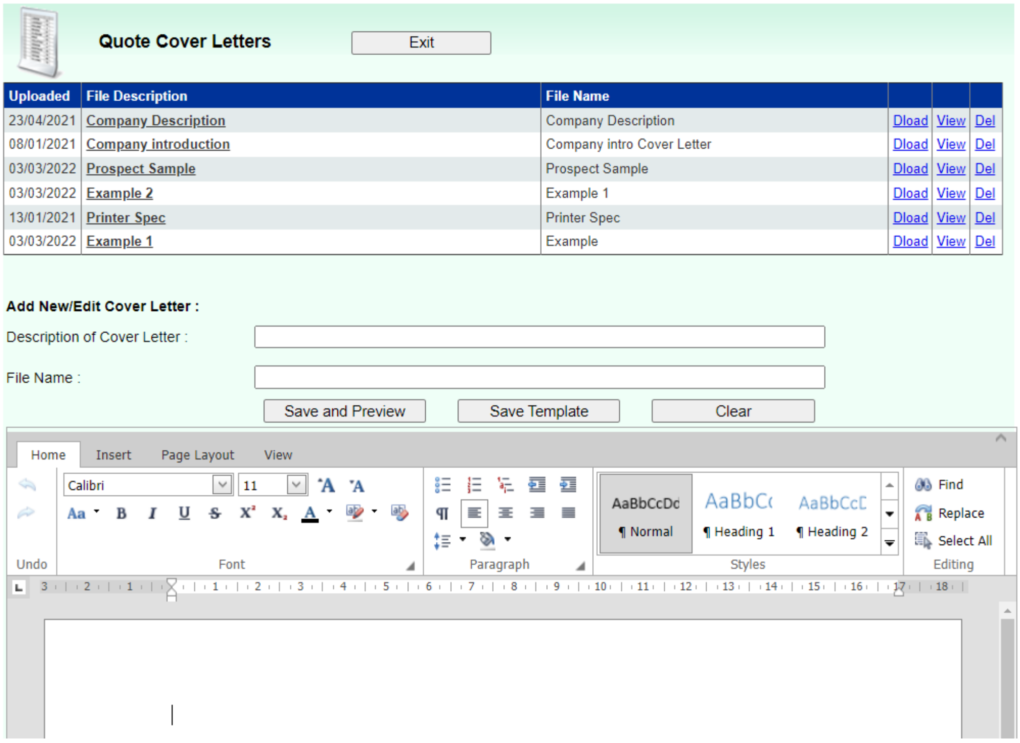
If a user were only allowed to quote using certain pricelists, this is where the different pricelists would be associated with the different users. (The user would need to have the **Restricted Pricelist role** on their profile ticked.)

With this the user will only be able to apply the allowed Pricelist/s to any new companies added to the system, however the user would be able to quote clients on other pricelists if the client has already been assigned to a different pricelist by someone else in the system.

29. Quote 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.

Quote Cover Letters can contain Text, Tables, Images and Bullet Lists.
Please ask your consultant for the Quote Cover Letter Manual if you are interested in setting these up. (SM0023- BluWave CRM- Quote Cover Letters)



Current Products Section

A Current Product can also be referred to as an assets, serialised equipment, subscriptions, or contracts. This section can be used to keep track of these kinds of products or services to your clients.

30. Agreement Status

This fields will be set to keep track of the active, on hold, inactive or cancelled agreements. Each status would need to have a state: A- Active, S-Sold, X- Lost, Y- Not Active.

31. Agreement 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.

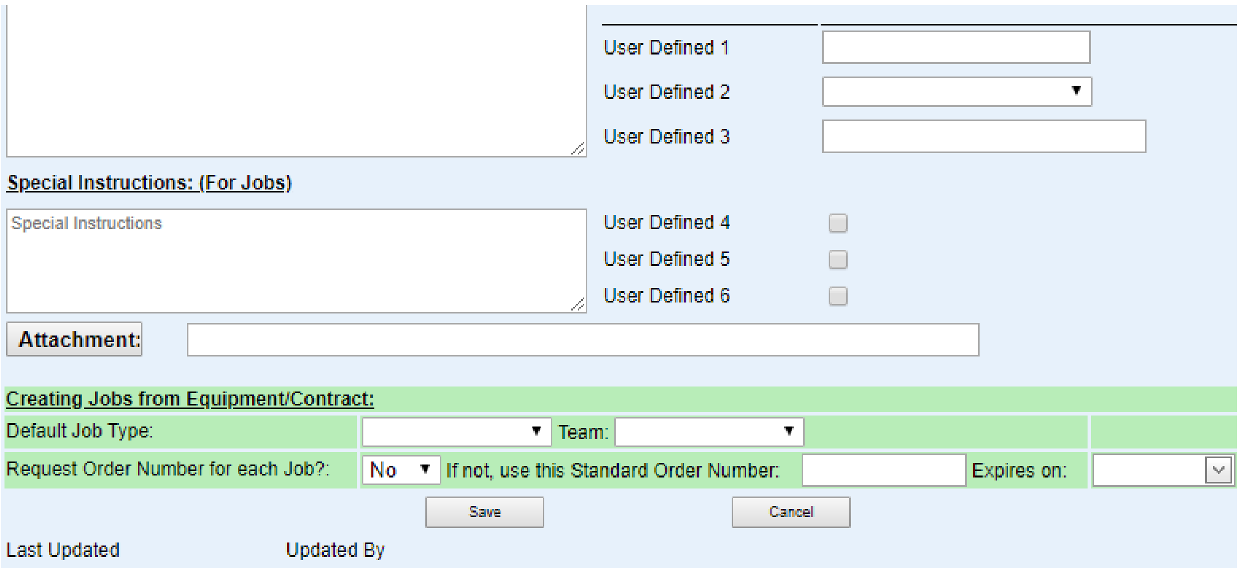
32. User-Defined Fields- Current Product

User-Defined Fields are extra fields that can be utilized to add other data to the system and can also be customized to the user's requirements. These fields allow the user to categorise and segment the current products and can be used to generate mail lists and trigger workflows.

There are 6 user defined fields on the Current Product page.

32.1 Current Products Screen

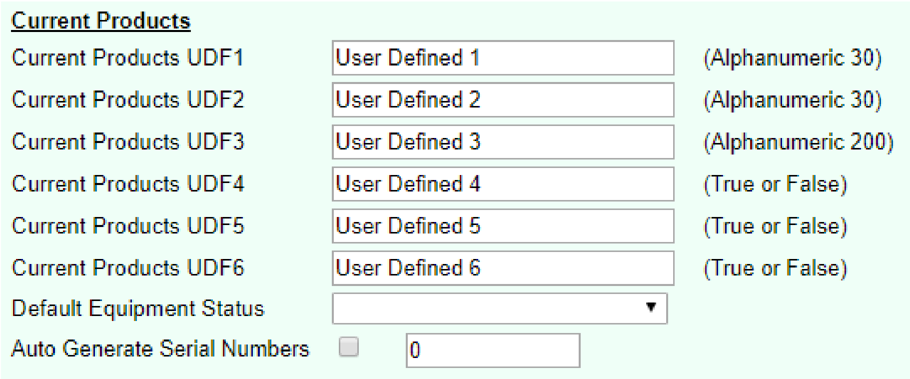
On the Current Products Screen there are 6 user defined fields that the user can customize to their requirements.



- **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.

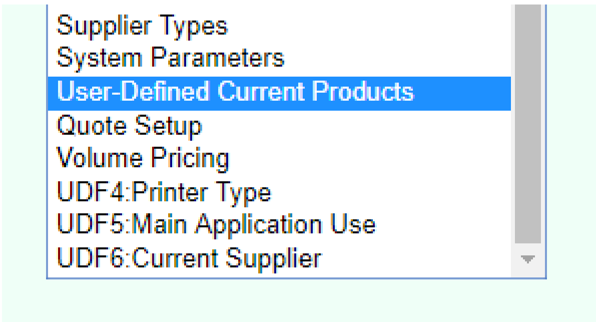
- **User Defined Field 4, 5 & 6** – are checkboxes that can be ticked or unticked to indicate true/ false values (i.e. yes or no answers)

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



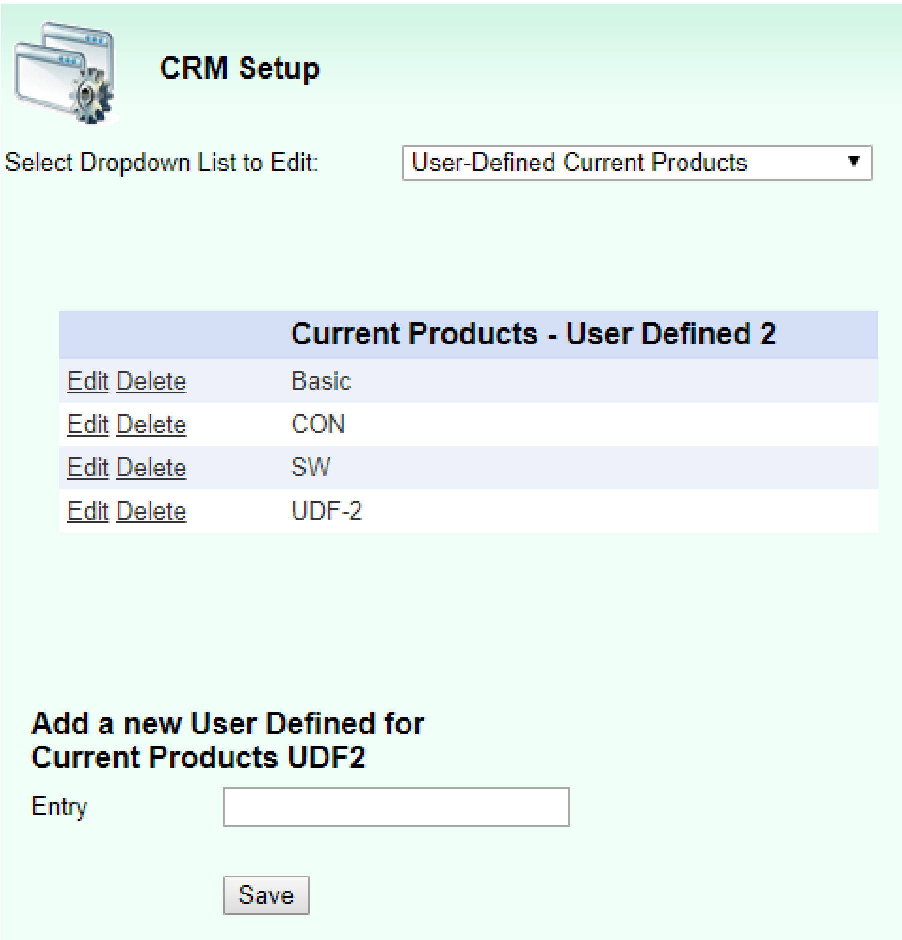
Once these changes are saved, the labels on the company page will be changed to what is entered her.

After the fields have been named, the dropdown fields should then be populated as to give the users the options to choose from.



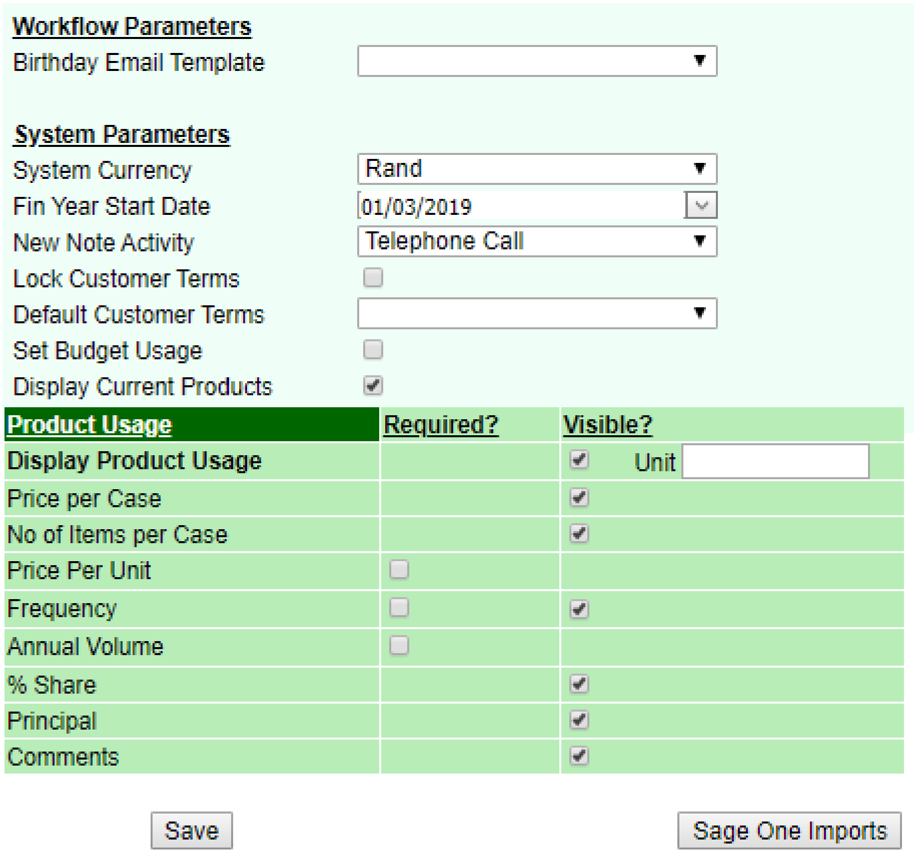
In the CRM Setup dropdown, scroll to the bottom and there you will find the option User-Defined Current products.

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



Additional Setup Section

33. System Parameters



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

33.1 Birthday Email Template

Choose an email template (that is already added in Email Templates- see heading 35) that will be sent to the clients on their birthday, if the checkbox next to their birthday is ticked on the Contacts screen.

33.2 System Currency

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

33.3 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.

33.4 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.

33.5 Lock Customer Terms

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

33.6 Default Customer Terms

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

33.7 Set Budget Usage

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

33.8 Display Current Products

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

33.9 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.

34. Document 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.

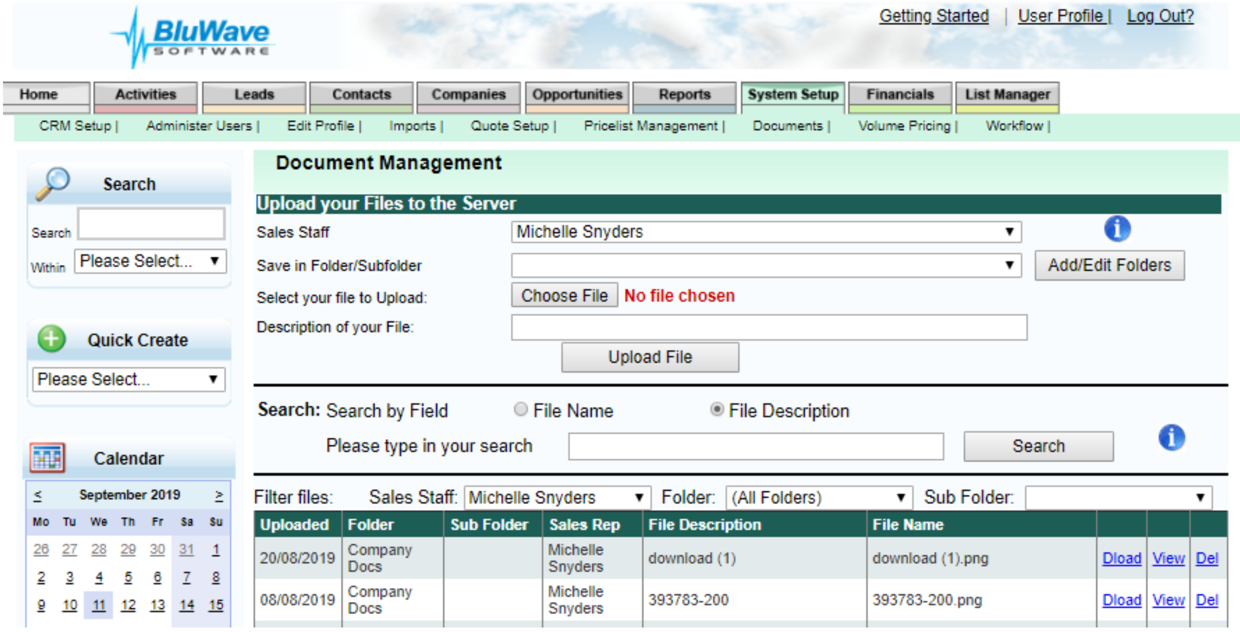
Administrators should create folders and subfolders on the BluWave document management area to allow for uploading marketing materials and quotes created by the system. These documents can then be attached to emails. Folders can either be public or private.

Public Folders are folders where other users would be able to view the content, but not change or delete. 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.

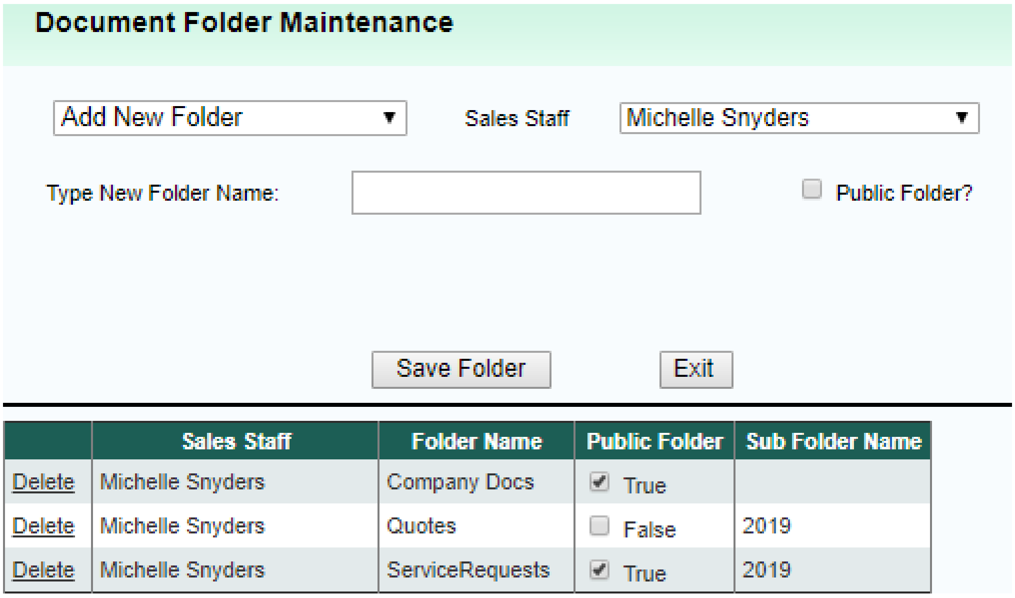
By sending quotes from BluWave, the system will create a folder called "Quotes" and the year as subfolders and save a copy of the quote in there. If quotes are not sent from Bluwave, a copy is NOT saved in the documents management section.

To view documents that are uploaded to the system or create new folders, click on the **System Setup menu** and then the **Documents option**.



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.

35. Email 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.

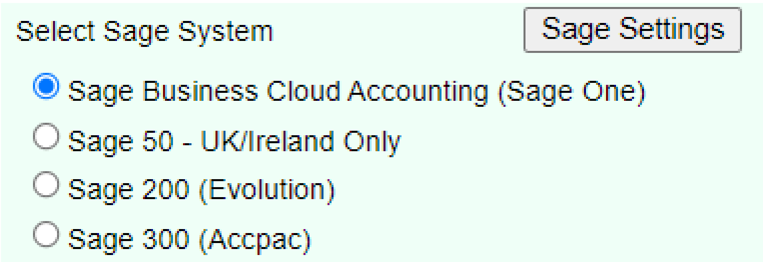
Email Templates used for Workflows can also include certain keywords to replace information relevant to the client, company or opportunity. Please ask your consultant for Workflow Manual if you are interested in setting these up. (SM0016- BluWave CRM- Workflows)

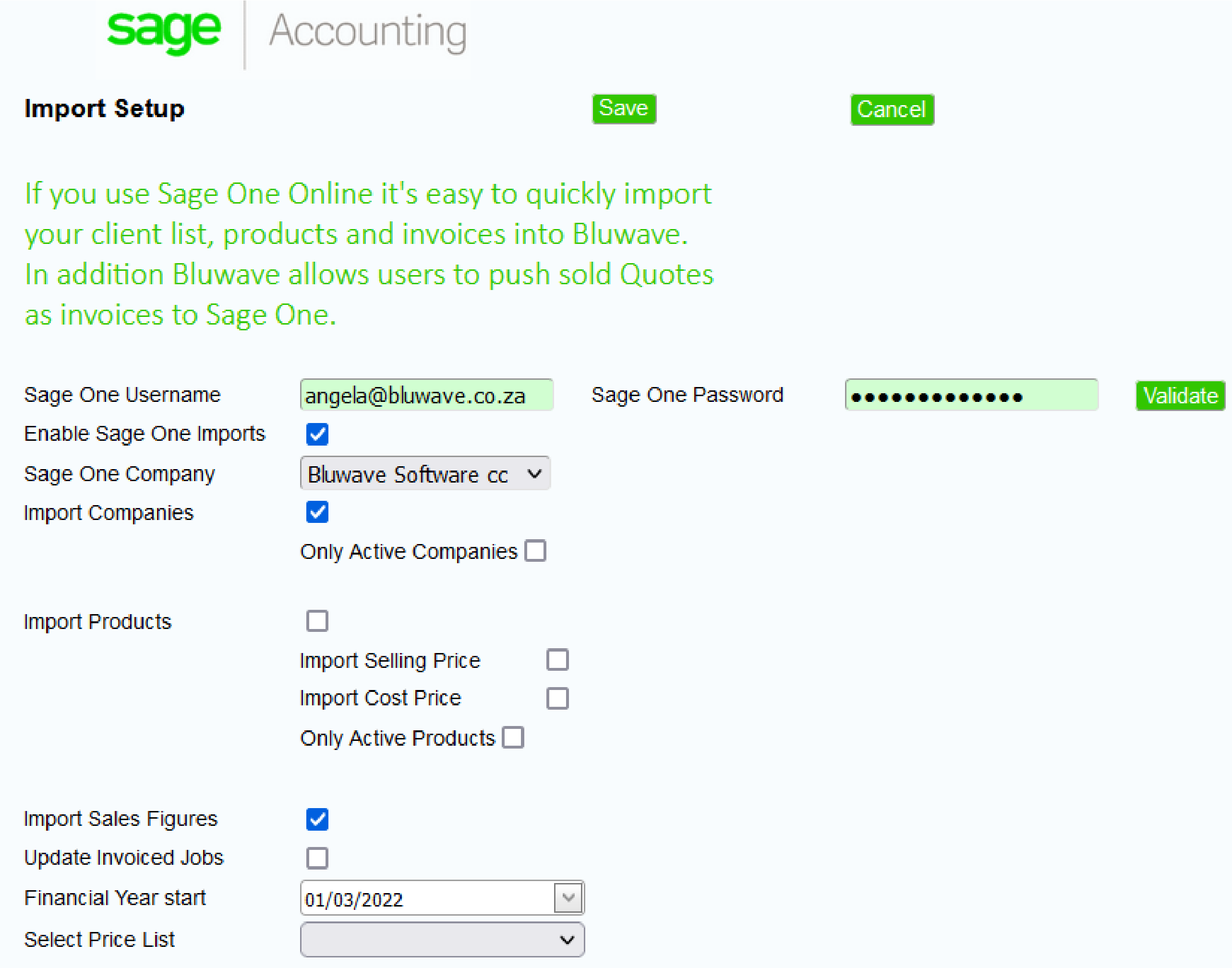
Accounting Package Integration Section

36. Integrating BluWave with Sage One (CRM)

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, select the Sage Business Accounting (**Sage One) radio button** and then click on the **Sage Settings** button.





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 Update Invoiced Jobs

If this is ticked the job number can be added to the Invoice in Sage and it will update the Bluwave Service jobs accordingly by entering the invoice number on the job.

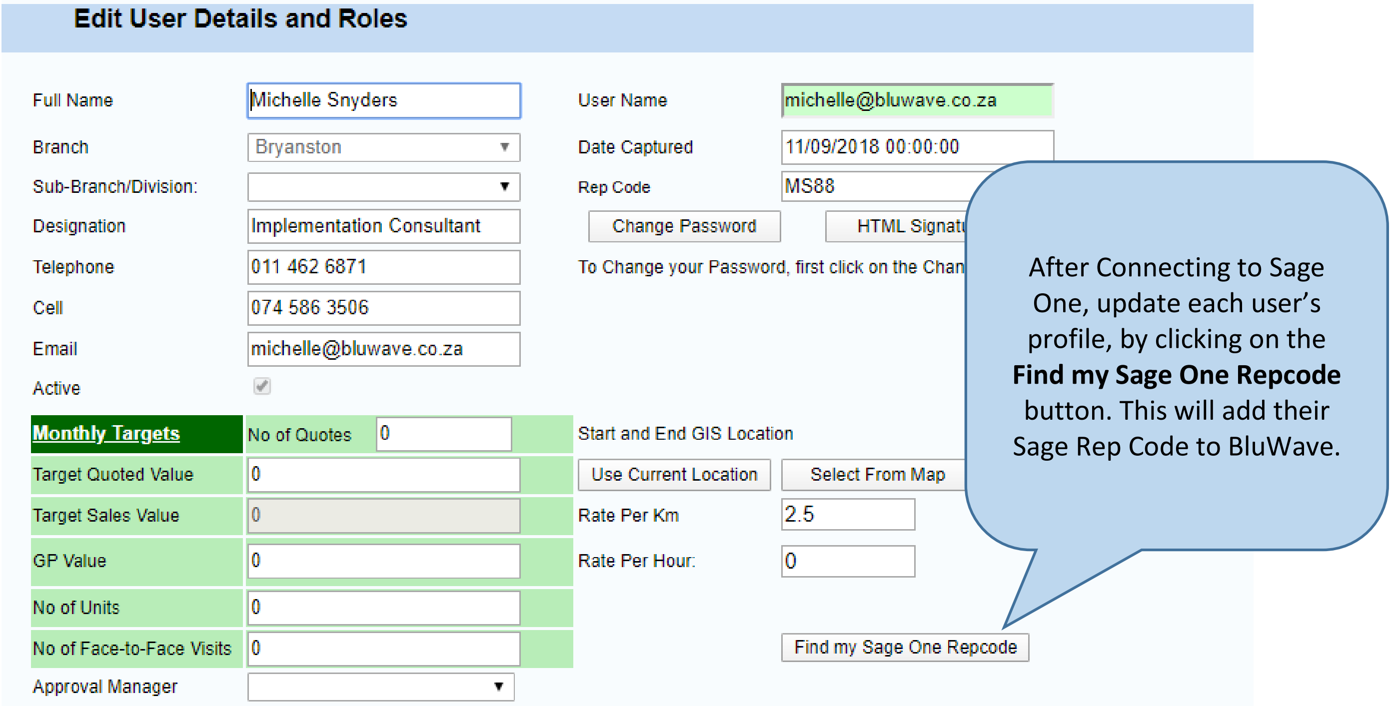
36.7 Financial Year Start

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

36.8 Select Pricelist

Sage Business Cloud can have multiple price lists stored, in this dropdown select the price list that need to be imported into BluWave on a daily basis.

Remember to click on Save to save the settings.



Appendix Section

37. Security Roles in BluWave CRM

	Security Roles	User levels						Special Rights							
Main function		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														✓

38. Quote Output 1- Example

PRINTER PLANET

JOHANNESBURG
info@printerplanetjhb.co.za
+27 21 354 4587

Quote

Doc No:	**1574**	Date:	**16/03/2022**
Acc No:	**TC001**	Valid for:	**14 Days**
To:	**Training Michelle**	Address:	**17 Leslie Ave Sandton 2191**
Att:	**Michelle**		
Tel:	**0981234567**	From:	**Michelle Bester**
Fax:		Tel:	**011 462 6871**
Cell:		Cell:	**074 586 3506**
Email:	**Mibpsnyders@gmail.com**	Email:	**mibpsnyders@gmail.com**

Dear **Michelle**

Re: **Example**

We thank you for the opportunity to quote on the below items. (Quote Header Paragraph)

Thank you for choosing Printer Planet!

Printer planet was established in 2001 with our main branch in Johannesburg.

We pride ourselves for being able to deliver goods for small to large companies and even sell products for household use at unbeatable prices.

For quality that is out of this world, Printer Planet is the best option.

From your stationary to printer needs, we provide the best deals for all our clients.

> "Create the kind of workplace and company culture that will attract great talent. If you hire brilliant people, they will make work feel more like play."
> -Richard Branson

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2002/002015/08

16 March 2022

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Quote

No: 1574

Option 1

Code: Description	Qty	Price	Total
EPTM : Epson TM88IV	1	4,000.00	4,000.00

TOTAL (Ex VAT) :	**R 4,000.00**
VAT :	**R 600.00**
Total:	**R 4,600.00**

Option 2

Code: Description	Qty	Price	Total
Can1 : Cannon G4400	1	3,400.00	3,400.00

Code: Description	Qty	Price	Total
HPBl : HP Ink Blue - 650	1	300.00	300.00

TOTAL (Ex VAT) :	**R 3,700.00**
VAT :	**R 555.00**
Total:	**R 4,255.00**

Payment Term

This quote is subject to the following Payment Term: 30 Days
These Payment Terms may not be changed once the quote has been accepted.
Should the client wish to change these Payment terms, a new quote will be issued with the updated Payment Terms.

Cancellation

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Quote

No: 1574

Should the client wish to cancel an order/ delivery/ contract, a written notice should be provided 2 weeks prior to the agreed-upon date.
A penalty of 10% will be payable by the client if these cancellation terms have not been met.

Currency of the Quote

This quote is done in the following currency: Rand
Should the client wish to change this currency, a new quote will be issued, and approval will be required.

Delivery

This quote is subject to the following Delivery Term: 2 Weeks
All goods shall be delivered at the previously agreed upon location. Location confirmation and details are expected in writing at least 1 week prior to delivery term date.
All goods will be delivered during business hours excluding weekends.
A deposit of 40% will be required 5 days prior to delivery. If the payment has not been made the products will not be delivered by the agreed-upon date and a new quote will need to be issued should the client wish to perchance the goods.

Liability

Except in relation to death or personal injury caused by Printer Planet negligence, Printer Planet shall not be liable to the Client by reason of any representation (other than fraudulent misrepresentation), any implied term or any express term of Contract for any direct, indirect, consequential or other loss or damage (including loss of profit), costs or expenses arising out of the sale or supply of the Goods, or their resale by the Customer.

Should you require any further information, please do not hesitate to contact us on (011) 462 7456 (Quote Footer Paragraph)

Michelle Bester

Manager

074 586 3506

mibpsnyders@gmail.com

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2002/002015/08

16 March 2022

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39. Quote Output 2- Example

PRINTER PLANET

JOHANNESBURG | +27 21 354 4587 | info@printerplanetjhb.co.za

Doc No:	**1574**	Date:	**16/03/2022**
Acc No:	**TC001**	Valid for:	**14 Days**
To:	**Training Michelle**	Address:	**17 Leslie Ave Sandton 2191**
Att:	**Michelle**		
Tel:	**0981234567**	From:	**Michelle Bester**
Fax:		Tel:	**011 462 6871**
Cell:		Cell:	**074 586 3506**
Email:	**Mibpsnyders@gmail.com**	Email:	**mibpsnyders@gmail.com**

Dear **Michelle**

Re: **Example**

We thank you for the opportunity to quote on the below items. (Quote Header Paragraph)

Thank you for choosing Printer Planet!

Printer planet was established in 2001 with our main branch in Johannesburg.

We pride ourselves for being able to deliver goods for small to large companies and even sell products for household use at unbeatable prices.

For quality that is out of this world, Printer Planet is the best option.

From your stationary to printer needs, we provide the best deals for all our clients.

"Create the kind of workplace and company culture that will attract great talent. If you hire brilliant people, they will make work feel more like play."
-Richard Branson

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16 March 2022

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Quote No: 1574

Michelle Bester
Manager
074 586 3506
mibpsnyders@gmail.com

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2002/002015/08

16 March 2022

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Quote No: 1574

Epson TM88IV

Option 1			
Code: Description	**Qty**	**Price**	**Total Rand**
EPTM : Epson TM88IV	1	4,000.00	4,000.00
		TOTAL (Ex VAT) :	**R 4,000.00**
		VAT :	R 600.00
		Total:	**R 4,600.00**

Option 2			
Code: Description	**Qty**	**Price**	**Total Rand**
Can1 : Cannon G4400	1	3,400.00	3,400.00
HPBl : HP Ink Blue - 650	1	300.00	300.00
		TOTAL (Ex VAT) :	**R 3,700.00**
		VAT :	R 555.00
		Total:	**R 4,255.00**

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16 March 2022

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Quote No: 1574

Payment Term

This quote is subject to the following Payment Term: 30 Days
These Payment Terms may not be changed once the quote has been accepted.
Should the client wish to change these Payment terms, a new quote will be issued with the updated Payment Terms.

Cancellation

Should the client wish to cancel an order/ delivery/ contract, a written notice should be provided 2 weeks prior to the agreed-upon date.
A penalty of 10% will be payable by the client if these cancellation terms have not been met.

Currency of the Quote

This quote is done in the following currency: Rand
Should the client wish to change this currency, a new quote will be issued, and approval will be required.

Delivery

This quote is subject to the following Delivery Term: 2 Weeks
All goods shall be delivered at the previously agreed upon location. Location confirmation and details are expected in writing at least 1 week prior to delivery term date.
All goods will be delivered during business hours excluding weekends.
A deposit of 40% will be required 5 days prior to delivery. If the payment has not been made the products will not be delivered by the agreed-upon date and a new quote will need to be issued should the client wish to perchance the goods.

Liability

Except in relation to death or personal injury caused by Printer Planet negligence, Printer Planet shall not be liable to the Client by reason of any representation (other than fraudulent misrepresentation), any implied term or any express term of Contract for any direct, indirect, consequential or other loss or damage (including loss of profit), costs or expenses arising out of the sale or supply of the Goods, or their resale by the Customer.

Should you require any further information, please do not hesitate to contact us on (011) 462 7456 (Quote Footer Paragraph)

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16 March 2022

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40. Quote Output Annuity- Example

PRINTER PLANET

JOHANNESBURG | +27 21 354 4587 | info@printerplanetjhb.co.za

Training Michelle **16/03/2022**
17 Leslie Ave Sandton 2191
Michelle
0981234567
Mibpsnyders@gmail.com

Attention: **Michelle**

Re: **Example**

Dear **Michelle**

We thank you for the opportunity to quote on the below items. (Quote Header Paragraph)

Should you require any further information, please do not hesitate to contact us on (011) 462 7456 (Quote Footer Paragraph)

Michelle Bester
Manager
074 586 3506
mibpsnyders@gmail.com

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2002/002015/08

Initial____________

16 March 2022

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Quote No: **1574**

Printers

1. Option 1

Description	Qty	Once Off (excl VAT)	Monthly (excl VAT)
1. 1. EPTM : Epson TM88IV	1		4,000.00
Sub Total		**R 0.00**	**R 4,000.00**

2. Option 2

Description	Qty	Once Off (excl VAT)	Monthly (excl VAT)
2. 1. Can1 : Cannon G4400	1		3,400.00
2. 2. HPBl : HP Ink Blue - 650	1	300.00	
Sub Total		**R 300.00**	**R 3,400.00**

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Quote No: **1574**

Summary of Proposal

Description	Once Off (excl VAT)	Monthly (excl VAT)
1. Option 1		4,000.00
2. Option 2	300.00	3,400.00
Printers TOTAL	**300.00**	**7400.00**
SUBTOTAL	**R 300.00**	**R 7,400.00**
VAT	R 45.00	R 1,110.00
TOTAL INVESTMENT	**R 345.00**	**R 8,510.00**

Payment Term

This quote is subject to the following Payment Term: 30 Days
These Payment Terms may not be changed once the quote has been accepted.
Should the client wish to change these Payment terms, a new quote will be issued with the updated Payment Terms.

Cancellation

Should the client wish to cancel an order/ delivery/ contract, a written notice should be provided 2 weeks prior to the agreed-upon date.
A penalty of 10% will be payable by the client if these cancellation terms have not been met.

Currency of the Quote

This quote is done in the following currency: Rand
Should the client wish to change this currency, a new quote will be issued, and approval will be required.

Delivery

This quote is subject to the following Delivery Term: 2 Weeks
All goods shall be delivered at the previously agreed upon location. Location confirmation and details are expected in writing at least 1 week prior to delivery term date.
All goods will be delivered during business hours excluding weekends.
A deposit of 40% will be required 5 days prior to delivery. If the payment has not been made the products will not be delivered by the agreed-upon date and a new quote will need to be issued should the client wish to perchance the goods.

Liability

Except in relation to death or personal injury caused by Printer Planet negligence, Printer Planet shall not be liable to the Client by reason of any representation (other than fraudulent misrepresentation), any implied term or any express term of Contract for any direct, indirect, consequential or other loss or damage (including loss of profit), costs or expenses arising out of the sale or supply of the Goods, or their resale by the Customer.

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Initial____________

16 March 2022

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41. Revision History

Version	Date	Updates
SM0020.4	16/03/2022	• Updated the Email Settings • Added the Security Roles summary • Added the Contact Profile Categories and Keywords • Re-ordered the setup topics into sections • General updates to the content • Added Quote Output Examples
SM0020.5	30/01/2023	• Updated the Email Settings