



Course 1
With Opportunity Tracking



Course 1
With Opportunity Tracking
Training

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1. System Overview

Home	The Home Tab gives the user access to Appointments, Tasks, Recent Opportunities, New Leads, Recent Companies and the Sales Pipeline. The Calendar allows the user to navigate to any date and the Quick Create menu is a shortcut to relevant pages in the website. The users dashboard with a graphical summary of his key statistics is also accessed from the Home tab.
Activities	The Activities Tab allows the user to access all the pages used to manage all your daily appointments and to-do's.
Leads	The Leads page is used for loading and editing Leads that have not yet been qualified. Once contact is made with leads they are converted to the Companies tab – see below.
Contacts	The Contacts page allows the user to search on all contacts entered. New contacts can also be added from this page. This page will only show the contacts entered for Companies only and not for Leads
Companies	The Companies page is used to display and edit all relationship information about the client. From this page you can view and edit a client's contact people, history of activities, scheduled activities and sales opportunities.
Opportunities	The Opportunities page allows you to see all your active and inactive deals. You can edit your opportunities on this page, update the sales status, filter and sort any field in ascending or descending order.
Reports	The Reports page will allow you to access all the reports available in system. Examples of reports included are Activity reports, Opportunity reports, Company reports and Lead Reports.
System Setup	The system setup page is used to edit and configure drop down lists to suit their particular requirements.

2. Home Page

When you login you will land on the Home page.

The Home Page allows you to view appointments, tasks, and opportunities. You can also view recently added companies a graphic display of your pipeline.

There are 3 main pages accessible on the home page: **Home**, **Dashboard** and **Edit my Profile**

Home

The screenshot shows the BluWave CRM Home page. At the top, there is a navigation bar with the BluWave logo, a trial expiration notice ("You have 8 days left until your trial expires. Please click here to purchase"), and links for "Change Password?" and "Log Out?". Below this is a menu with tabs for Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, and System Setup. A secondary navigation bar includes "Home | Dashboard | Edit my profile |" and "Version 1.0".

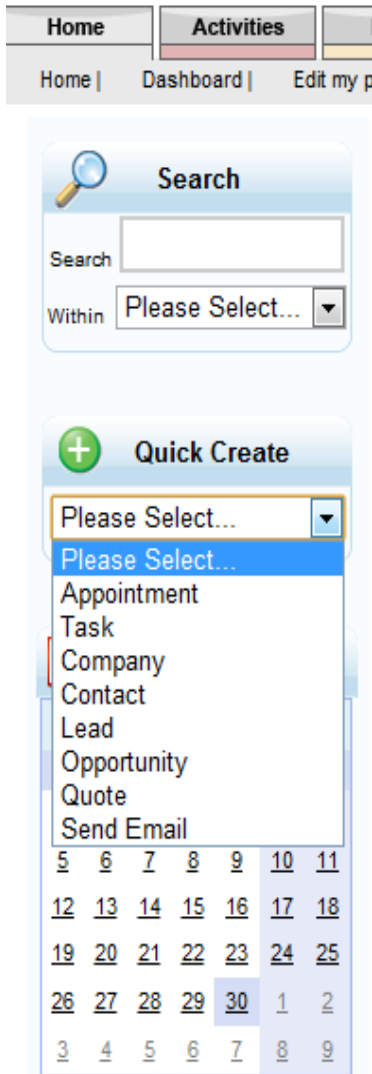
The main content area is divided into several sections:

- Search:** Includes a search box and a "Within" dropdown menu.
- Quick Create:** A button with a plus sign and a dropdown menu.
- Calendar:** A calendar view for April 2011.
- Appointments for 14/04/2011:** A list of appointments with times, names, and company names. Includes links for "Go to Diary Planner" and "To do list".
- Tasks for 14/04/2011:** A list of tasks with names and company names. Includes links for "Go to Diary Planner" and "To do list".
- Recent Opportunities:** A list of opportunities with company names and descriptions. Includes a link for "Go to Opportunities".
- New Leads:** A list of new leads with company names and names. Includes a link for "Go to Leads".
- Pipeline for April:** A funnel chart showing the sales pipeline for April with various stages and values.

A callout box points to the "Go to Opportunities" link in the Recent Opportunities section, containing the text: "Clicking on the hyperlinks takes you to the respective page directly".

At the bottom of the Recent Opportunities section, there is a link for "Go to Companies".

Quick Create and Calendar



The Quick Create Menu on the left of the Home Screen acts as a short cut to navigate to relevant screens to create a new appointment, task company, lead or opportunity

If you change the calendar date, the Home page, Appointments and Task Panel will reflect the selected date

Dashboard

Home | **Activities** | Leads | Contacts | Companies | Opportunities | Reports | System Setup Version 1.0

Home | Dashboard |

Search

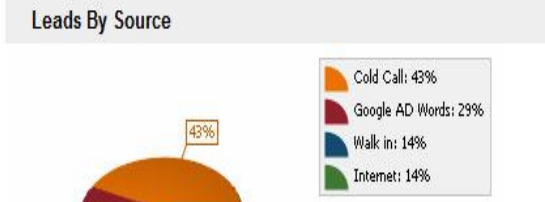
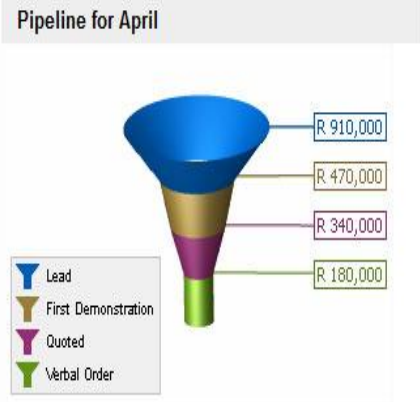
Search

Within

Quick Create

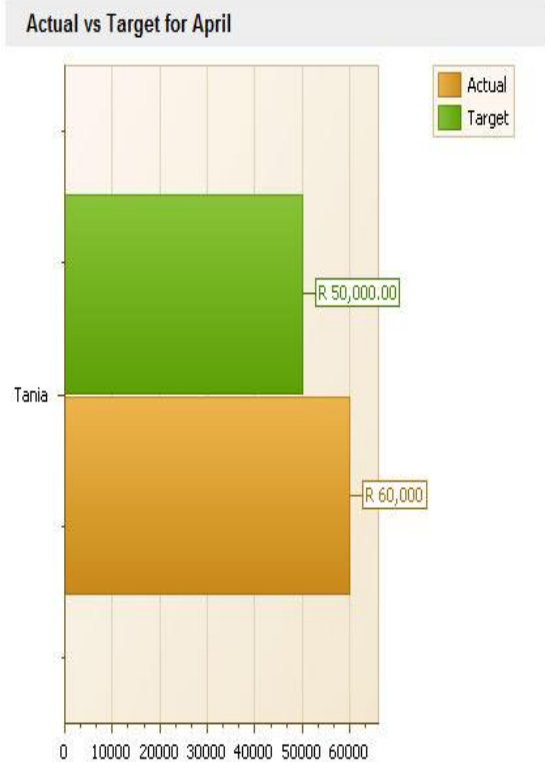
Calendar

Please Select Dashboard View



Top 10 Opportunities for April

Spectrum Distribution	R 340,000.00	20
Spectrum Distribution	R 330,000.00	10
First Technologies	R 325,000.00	10
Diamond Products	R 250,000.00	20
Abacus Computing	R 240,000.00	50
CC Imelmann Labs	R 180,000.00	80
CC Imelmann Labs	R 100,000.00	45
First Technologies	R 100,000.00	20
BluWave Software	R 30,000.00	80
SuperWave	R 5,000.00	10



Edit My 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 page or from the “**Change Password**” link on the top right of the page.

Search
Search:
Within: Please Select...

Quick Create
Please Select...

Calendar
October 2011
Mo Tu We Th Fr Sa Su
26 27 28 29 30 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31 1 2 3 4 5 6

Edit User Details and Roles

Full Name: User Name:

Branch: Date Captured:

Designation:

Telephone:

Cell:

Email: Monthly Target:

Active:

Do you want BluWaveCRM to book appointments into your email calendar?

Is your email calendar local (Outlook, Lotus Notes, Entourage) or Gmail?
 Local Calendar (Ca) Gmail Calendar

Email SMTP Settings : (The SMTP settings are used when sending emails from BluWave CRM)

SMTP: User Name:

Password:

Roles User Manager Executive System Admin Setup

On this page, the user can also specify whether they want the system to post appointments to their Email calendar. Specify whether you are using a local calendar e.g. Outlook or a web based calendar e.g. Gmail by selecting the appropriate radio button.

Enter your Email SMTP settings, Username and Password on this page to allow sending Emails from the BluWave CRM.

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

3. View Companies



Use View Companies Screen to:

- Search for the company name to view the details of that client.
- Add new Clients to the database. Note: Only Administrators can delete Clients from the database.

Add Company



Click on Add New Company to add a new prospect or customer.

Add Company

Save Save & New Cancel

Company Name *

Account Number

Sales Staff ▼

Date Opened

Category ▼

Website →

Type ▼

User Defined 1

State ▼

User Defined 2

Source ▼

User Defined 3

Industry ▼

User Defined 4 ▼

Area ▼

User Defined 5 ▼

User Defined 6 ▼

Save Save & New Cancel

- Indicate whether this Client is a Prospect or a Customer by using the category field
- There are 6 user defined fields. These fields are indicated and set-up by your Administrator.
- NB! Categorize a client database using the category field. Customers should be broken down by value or potential value into for example: A, B and C type customers and VARs and distributors.

View Companies

This page allows you to see all loaded companies. You can also search for particular companies using the filters on the far right.

Home Activities Leads Contacts Companies Opportunities Reports System Setup

Version 1.0

Add New Company |
View Companies |

Search

Search

Within Please Select...

Quick Create

+ Please Select...

Calendar

< April 2011 >

Mo	Tu	We	Th	Fr	Sa	Su
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

View Companies

Filter All Companies

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V							
	<u>Company Name</u>																						<u>Acc No</u>	<u>Cat</u>	<u>Type</u>	<u>Industry</u>	<u>Area</u>	<u>Sales Rep</u>	<u>Created</u>
Edit	Delete	Abacus Computing																						P	B Type	Chemicals	JHB - Southern Suburbs	Tania	05/04/2011
Edit	Delete	ABC Manufacturing																						P	A Type	Pharmaceuticals	JHB - Eastern Suburbs	Tania	05/04/2011
Edit	Delete	ABC Shoes																						P		Chemicals	Eastern Cape	Quin Bergh	06/04/2011
Edit	Delete	Ajax																						P		Chemicals	Eastern Cape	Denzil Govender	16/04/2011
Edit	Delete	Alex Ice Cream Distributors																						P	C Type	Electronics	Eastern Cape	Alex	17/04/2011
Edit	Delete	BluWave Software																						P	A Type	Chemicals	JHB - Western Suburbs	byron	04/04/2011
Edit	Delete	CC Imelmann Labs																						P	B Type	Laboratory	Eastern Cape		05/04/2011
Edit	Delete	Diamond Products																						P	A Type	Mining	Eastern Cape		05/04/2011
Edit	Delete	First Technologies																						P	C Type			Tania	05/04/2011
Edit	Delete	HellermannTyton																						P	A Type	Construction	JHB - Eastern Suburbs	Tania	16/04/2011

1 2 3

Click on the Company name to edit that company or click on the Edit link. Click on the Delete link to remove the company from the database.

Edit Company

Edit Company [Update] [Cancel] [Print Card]

Company Detail

Company Name	<input type="text" value="BluWave Software"/>	Account Number	<input type="text"/>
Sales Staff	<input type="text" value="samuel"/>	Date Opened	<input type="text" value="23/06/2011"/>
Category	<input type="text" value="Prospect"/>	Website	<input type="text"/>
Type	<input type="text" value="Active Prospect"/>	Udf1	<input type="text"/>
State	<input type="text"/>	Udf2	<input type="text"/>
Source	<input type="text" value="Cold Calling"/>	Udf3	<input type="text"/>
Industry	<input type="text" value="Engineering"/>	Udf4	<input type="text"/>
Area	<input type="text" value="Gauteng"/>	Udf5	<input type="text"/>
		Udf6	<input type="text"/>

Contacts [New]


Scheduled Activities [New]

Completed Activities [New]

Opportunities [New Quote] [New]



- Make the necessary changes to the company details and click the Update button.
- You can view the contacts, activities and opportunities assigned to this company by clicking on the down arrow.
- You can also add new contacts, activities and opportunities by clicking on the link “New”.


3.1 The Contact List


















Edit Company


Company Detail


Company Name	<input type="text" value="BluWave Software"/>	Account Number	<input type="text"/>
Sales Staff	<input type="text" value="Tania"/>	Date Opened	<input type="text" value="04/04/2011"/>
Category	<input type="text" value="Prospect"/>	Website	<input type="text"/> 
Type	<input type="text" value="A Type"/>	User Defined 1	<input type="text" value="0"/>
State	<input type="text" value="Active Customer"/>	User Defined 2	<input type="text" value="0"/>
Source	<input type="text" value="Internet"/>	User Defined 3	<input type="text"/> 
Industry	<input type="text" value="Chemicals"/>	User Defined 4	<input type="text"/>
Area	<input type="text" value="JHB - Western Suburbs"/>	User Defined 5	<input type="text"/>
		User Defined 6	<input type="text"/>

Contacts 

Contact	Name	Tel	Fax	Designation
4	Byron Cooke-Tonnesen Mr	 011 462 6871 		Chief Executive Officer in charge of all things to test the length of
1	Denzil Govender Mr	 011 462 6871 		Managing Director
3	Quin Bergh Mr	 011 462 6871 		Managing Director
6	Samuel Kimathi Mr	 011 462 6871 		General Manager
2	Sheila Welch Ms	 011 462 6871 		Sales Manager
5	Stuart Lowe Mr	 011 462 6871 		Sales & Marketing Director
7	Tania Cooke-Tonnesen Ms	 011 462 6871 		Human Resources Manager

Scheduled Activities 

Completed Activities 

Opportunities 

- Expand the Contact list by clicking on the down arrow in the same line.
- Click on the contact in order to open the contact editing form.
- Click on the new button to add a new contact.

3.2 Edit the Contact

Edit Contact

Contact Details

Company:

Title: First Name: Initials: Tel:

Surname: Fax:

Designation: Cell:

Category: Email:

Secretary:

Address Details

Postal Address:

Physical Address:

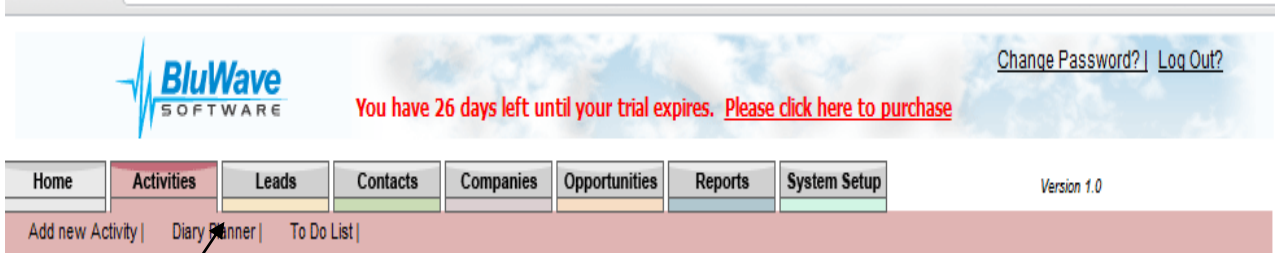
Postal Code: Physical Code:

Country: Country:

Last Updated 09/04/2011 Updated By Tania

- Make your changes to the contact and click on the Update button.

4. Diary Planner



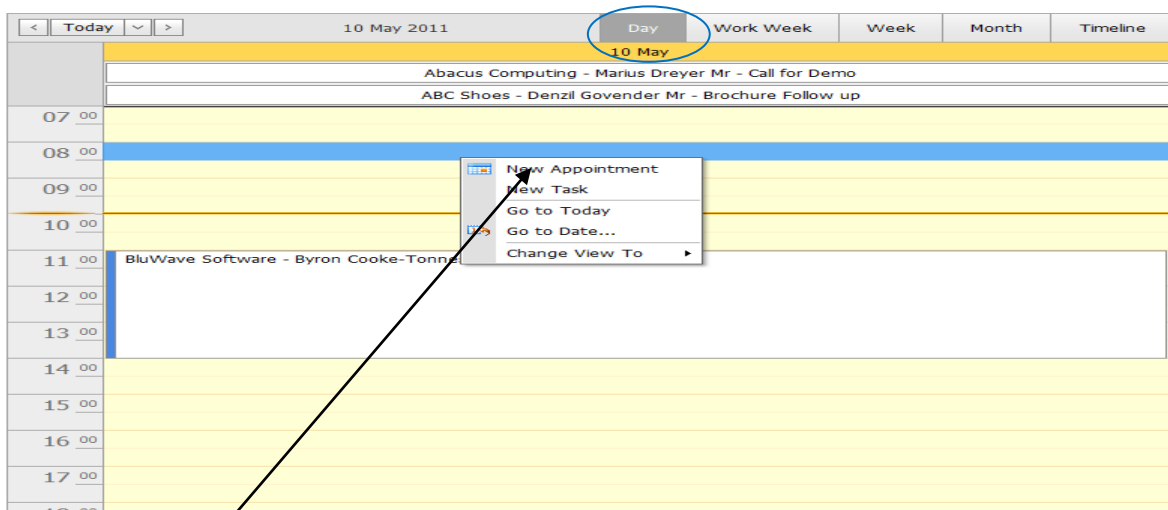
Access the diary planner from the Activities tab.

These views show the appointments for the day in the yellow section and the tasks at the top in the grey section. You can view your diary for a day, week or month.

Day View

The Day view shows all appointments and tasks that have been scheduled for the particular day.

Access the different diary planner views using the tabs below. (Day, Work Week, Week, Month & Timeline)



- Right click on an empty time slot to create an Appointment for that time or to create a new Task.
- Right click on a particular Appointment or Task and select "Open" to edit or complete the particular Appointment/Task
- Note that the highlighted bold line indicates the current time.

Work Week View

The Work Week View shows all scheduled activities for the working week hence excludes Saturday and Sunday.

<input type="button" value="Today"/> <input type="button" value="Day"/> <input type="button" value="Work Week"/> <input type="button" value="Week"/> <input type="button" value="Month"/> <input type="button" value="Timeline"/>					
04 – 08 April 2011					
	04 April	05 April	06 April	07 April	08 April
	ABC Shoes - Denzil Govender Mr - Brochure Follow up	BluWave Software - Denzil Govender Mr - Customer Survey BluWave Software - Denzil Govender Mr - Send Quote		SuperWave - Ross Botha Mr - Arrange Cust Visit	SuperWave - Ross Botha Mr - Quote Follow up Abacus Computing - Marius Dreyer Mr - Call for Order CC Imelmann Labs - Diana Shaw Ms - Present Proposal ABC Shoes - Denzil Govender Mr - Brochure Follow up
07 ⁰⁰					
08 ⁰⁰					
09 ⁰⁰					
10 ⁰⁰		Diamond Products - Dales Son Mr - 2nd Consultation			BluWave Software - Denzil Govender Mr - BluWave Demo
11 ⁰⁰			BluWave Software -		
12 ⁰⁰					
13 ⁰⁰					
14 ⁰⁰					
15 ⁰⁰					ABC Shoes - Denzil Govender Mr - 2nd Consultation
16 ⁰⁰	BluWave Software -				sent brochure - call
17 ⁰⁰					
18 ⁰⁰					

Week View

The Week shows all scheduled appointments and tasks for the week and will include Saturday and Sunday.

<input type="button" value="Today"/> <input type="button" value="v"/> <input type="button" value=">"/>		11 – 17 April 2011		Day	Work Week	Week	Month	Timeline
11 April				14 April				
BluWave Software - Sheila Welch Ms - BluWave Demo				BluWave Software - Byron Cooke-Tonnesen Mr - Brochure Follow up				
				BluWave Software - Byron Cooke-Tonnesen Mr - Book Training				
				Show more				
12 April				15 April				
13:30	15:30	BluWave Software - Samuel Kimathi Mr - BluWave Demo		CC Imelmann Labs - Diana Shaw Ms - Send Quote				
13:30	15:30	BluWave Software - Samuel Kimathi Mr - BluWave Demo		14:00	14:30	BluWave Software - Byron Cooke-Tonnesen Mr - Call for Order (at site)		
				Show more				
13 April				16 April				
				00:30	01:00	ABC Shoes - Denzil Govender Mr - Cold Call (Office)		
				08:30	09:00	BluWave Software - Byron Cooke-Tonnesen Mr - Arrange Cust Visit		
				Show more				
				17 April				

Month View



Today		April – May 2011			Day	Work Week	Week	Month	Timeline
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday/Sunday				
04 April	5	6	7	8	9				
ABC Shoes - Denzil Govender Mr - Brochure Follow up	BluWave Software - Denzil Govender Mr - Customer Survey		SuperWave - Ross Botha Mr - Arrange Cust Visit	SuperWave - Ross Botha Mr - Quote Follow up					
16:00 16:30 BluWave Software - Denzil Govender Mr - Call Demo (Bryanst	BluWave Software - Denzil Govender Mr - Send Quote	11:00 11:30 BluWave Software - Denzil Govender Mr - BluWave Demo (Office)		Abacus Computing - Marius Dreyer Mr - Call for Order		Show more			
	09:30 12:30 Diamond Products Dales Sor Mr - 2nd Consultat			CC Imelmann Labs - Diana Shaw Ms - Present Proposal	10				
				ABC Shoes - Denzil Govender Mr - Brochure Follow up		Show more			
11	12	13	14	15	16				
BluWave Software - Sheila Welch Ms - BluWave Demo			09:00 11:00 First Technol - Byron Cooke M 2nd Consultat						
14:30 16:00 Abacus Computir Marius Dreyer M 2nd Consultat	13:30 15:30 Kimathi Mr - BluWave Demo				17				
	13:30 15:30 BluWave Software - Samuel Kimathi Mr - BluWave Demo								
18	19	20	21	22	23				
BluWave Software - Byron Cooke-Tonnesen Mr - Call for Demo									
					24				
25	26	27	28	29	30				
					01 May				
2	3	4	5	6	7				
					8				

Timeline View

The Timeline view will show all scheduled appointments and tasks for a Ten day period.

Today		14 – 23 April 2011			Day	Work Week	Week	Month	Timeline
14 April 2011 - 18 April 2011				18 April 2011 - 24 April 2011					
14 Thu	15 Fri	16 Sat	17 Sun	18 Mon	19 Tue	20 Wed	21 Thu	22 Fri	23 Sat
BluWave Software - Byron Cooke-Tonnesen Mr - Brochure Follow up BluWave Software - Byron Cooke-Tonnesen Mr - Book Training Show more	CC Imelmann Labs - Diana Shaw Ms - Send Quote BluWave Software - Byron Cooke-Tonnesen Mr - Call for Order (at site) Show more	ABC Shoes - Denzil Govender Mr - Cold Call (Office) BluWave Software - Byron Cooke-Tonnesen Mr - Arrange Cust Visit		BluWave Software - Byron Cooke-Tonnesen Mr - Call for Demo ABC Shoes - Denzil Govender Mr - Deliver Contract Abacus Computing Marius Dreyer Mr - 2nd Consultat	Phonatic - Tania Crookes - BluWave Demo (a phonatics) Phonatics - Tania Crookes - Call for Order	Phonatic Tania Crookes 2nd Consultat BluWave Software - Byron Cooke-Tonnesen Mr - BluWave Demo	Test - Test Testing Mr - BluWave Demo		

5. Managing your Activities

BluWave crm can automatically post your appointments into your default email calendar program.

BluWave CRM is compatible to any calendar program that has ICalendar support E.G. MS Office Outlook, Novell Groupwise, Google calendar, Yahoo calendar, Windows calendar, Microsoft entourage, Facebook etc

Each user can specify if he would like his **BluWave crm** appointments posted to his Calendar. If this function is activated by the user then your customer can also be invited (he will receive an emailed invitation). At booking time the user can elect NOT to invite the customer.

To activate this function, check the tick box shown below under system setup.

The screenshot displays the 'Edit User Details and Roles' interface. On the left, there are navigation tabs: Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, and System Setup. Below these are sub-tabs: System Setup, Administer Users, Edit My Profile, Change Password, Quote Setup, and Document Management. The main content area is titled 'Edit User Details and Roles' and contains the following fields and options:

- Full Name: samuel
- User Name: samuel@thirdwave.co.za
- Branch: Johannesburg
- Date Captured: 21/06/2011 14:33:24
- Designation: App consultant
- Telephone: 0781112745
- Cell: (empty)
- Email: samuel@thirdwave.co.za
- Active:
- Monthly Target: 10000
- Do you want BluWaveCRM to book appointments into your email calendar?: (indicated by a black arrow)
- Is your email calendar local (Outlook, Lotus Notes, Entourage) or Gmail?: Local Calendar (iCal) Gmail Calendar
- Email SMTP Settings: (The SMTP settings are used when sending emails from BluWave CRM)
 - SMTP: smtp.gmail.com
 - User Name: kiriinyakimathi@gmail.com
 - Password: (masked with asterisks)
- Roles: User Manager Executive System Admin Setup

Buttons at the bottom include 'Update Details', 'Update & New', and 'Cancel'.

Adding Appointments/ Tasks

Click on Add New Activity to schedule a task or appointment

Home | **Activities** | Leads | Contacts | Companies | Opportunities | Reports | System Setup

Add new Activity | Diary Planner | To Do List | Send Email

Edit Appointments [Update] [Update & New] [Cancel]

Appointment Details * = Required Fields

Sales Staff: samuel

Company: ABC Shoes

Contact: Sheila Welch mr * Invite Contact?

011 234 5674 082 414 9138 sheila@shezada.co.za

Location: 18 Curzon Rd Bryanston [View Map](#)

Activity: Quote Follow up *

Task?

Start Date: 18/10/2011 14:00

End Date: 18/10/2011 00:00

Note: Follow up QuoteNo: 1003

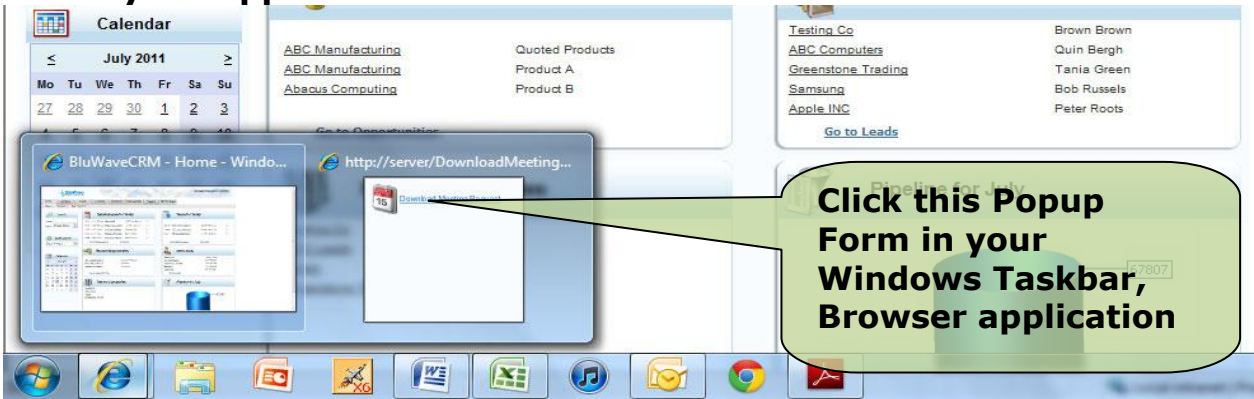
Completed?

[Update] [Update & New] [Cancel]

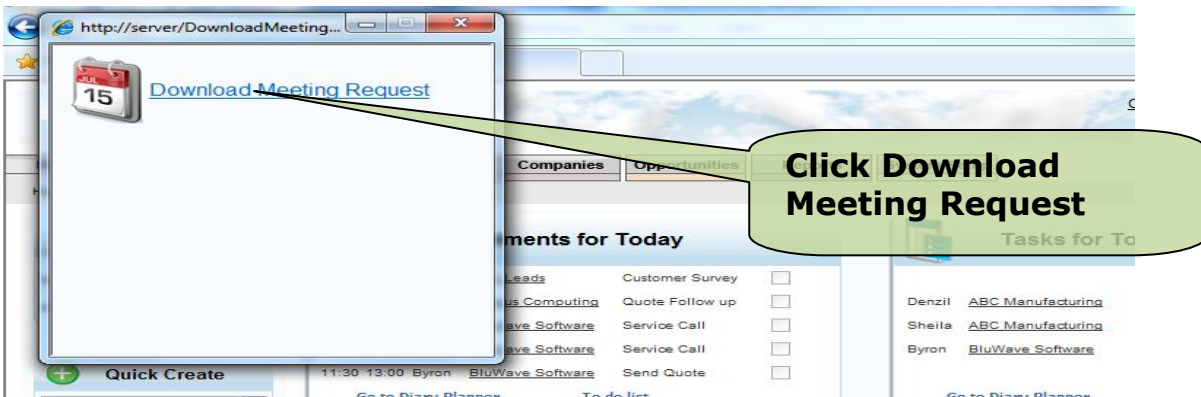
- Invite Contact? – This option defaults to “On”. If on the system will send an appointment invitation to your customer that he can accept into his calendar software – supports most email clients including MS Outlook, Lotus Notes, Gmail and any other. If you do not wish to send an appointment invitation to your customer then uncheck this box.
- The “View Map” link opens up Google Maps to locate the physical address.
- Select the company and contact person the activity relates to.
- Type the location of the activity.
- Select the type of Activity
- Tick the task box if this is a task and not an appointment. This will disable the Time fields. If this is an appointment, select the date and time.
- Task? Please note that if you indicate that this activity is a Task, the system will NOT post this activity to your calendar, nor will the client receive a meeting invitation.
- Type a note for the activity if required.
- Click on the save button. If you wish to create another activity click on the **save & New** button.

- Follow the below steps to post the appointment to your calendar.

Check your Appointment download on the taskbar

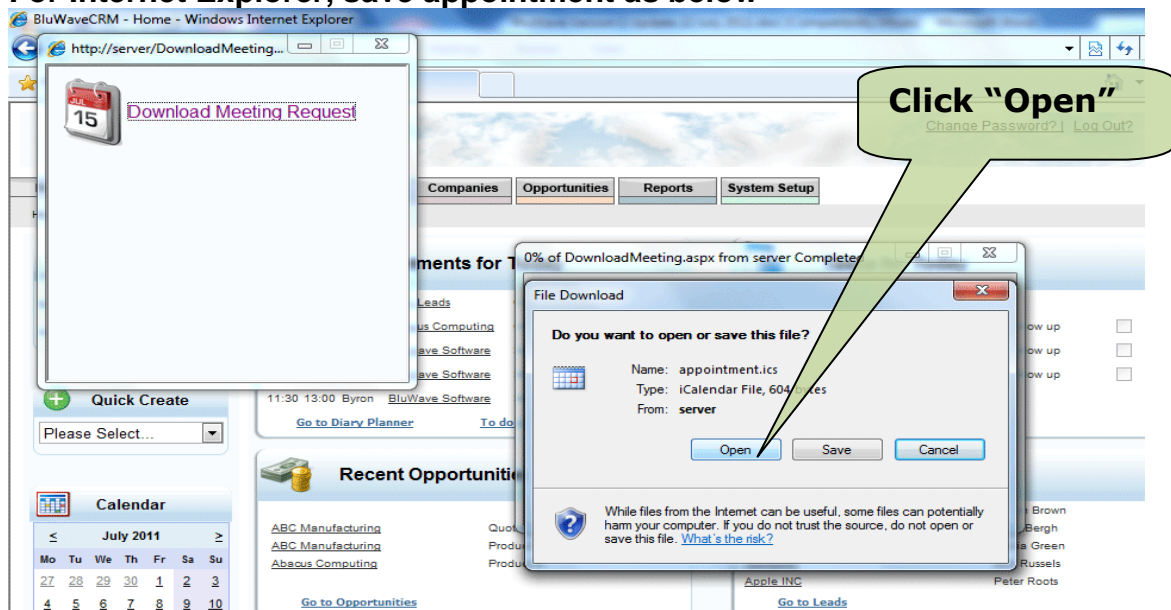


Download the meeting request

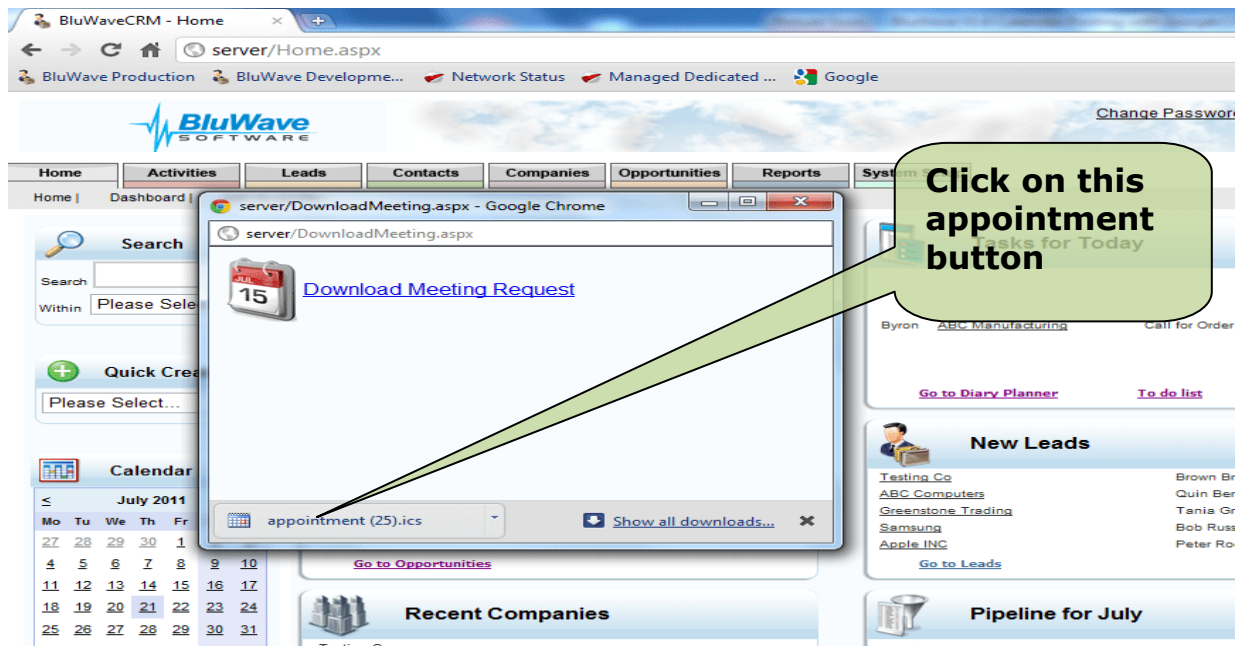


Save appointment in calendar

For Internet Explorer, save appointment as below

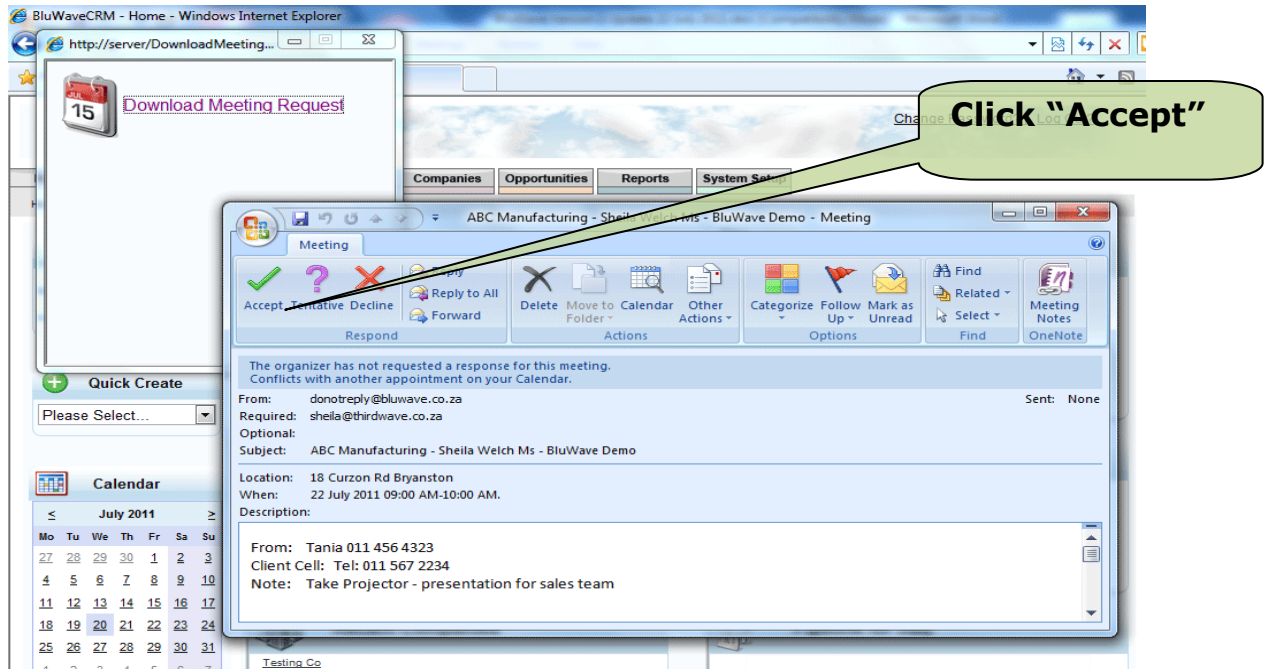


For Google Chrome, save appointment as below

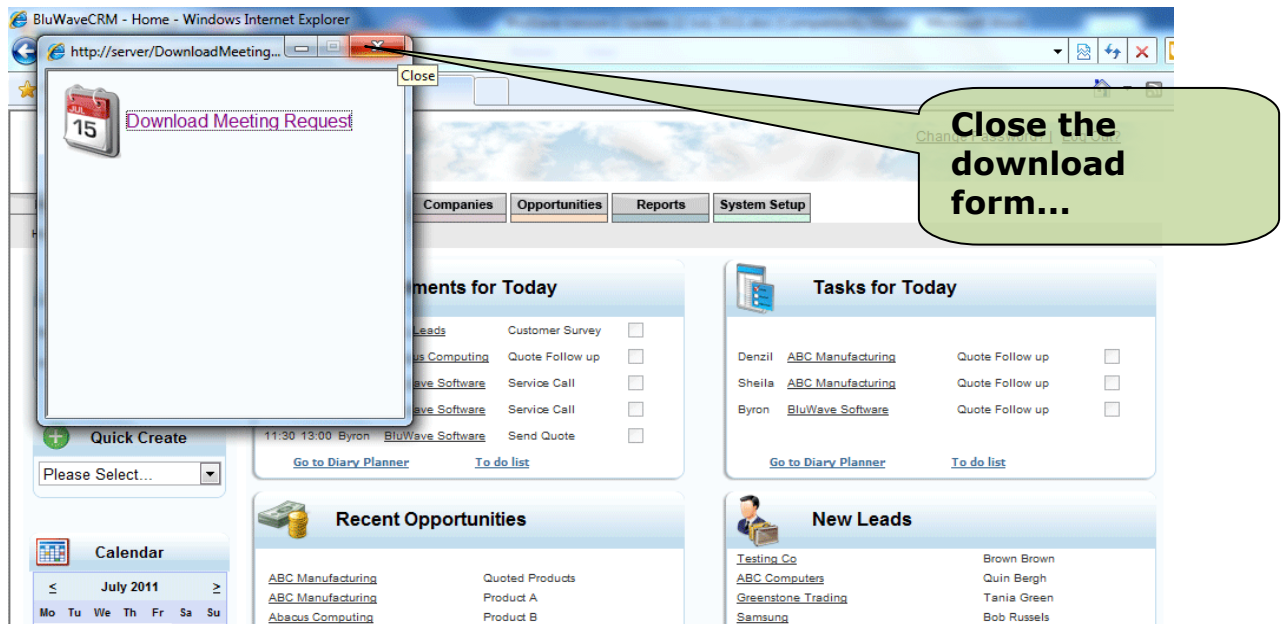


Accept the Meeting

The following Meeting Request will open and when you Accept it will be in your Calendar.

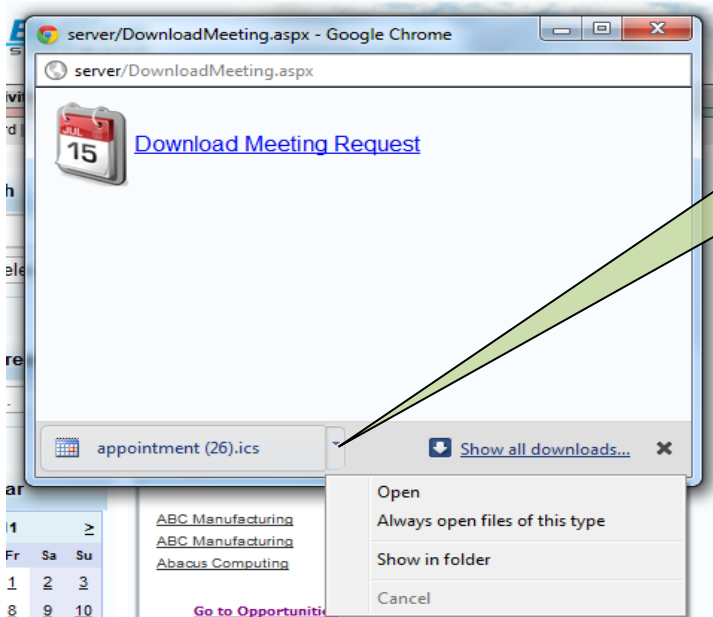


Once Accepted close the download form to continue with your BluWave system.

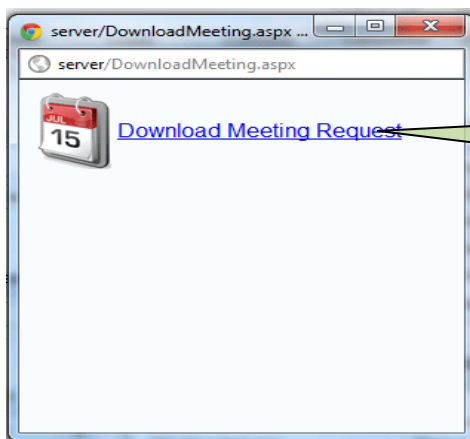


Faster Acceptance of Appointments in Google Chrome

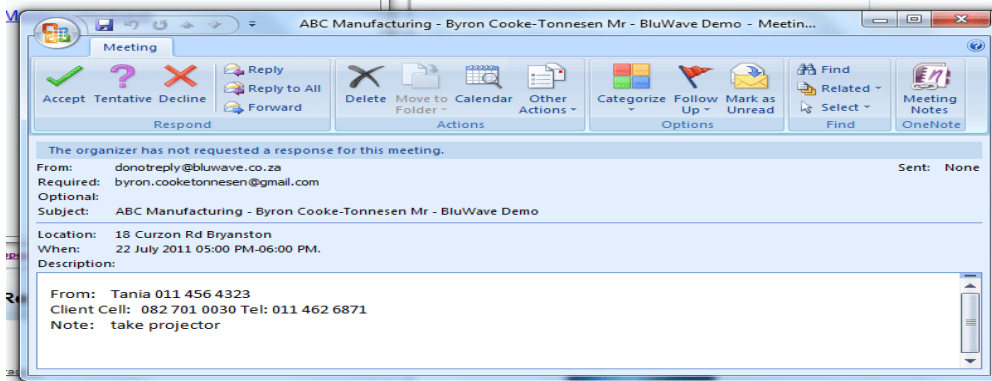
You can reduce the number of clicks required to accept an appointment via Google Chrome Web Browser by changing the following setting:



Click here to open a menu and select from the menu "Always open files of this type"

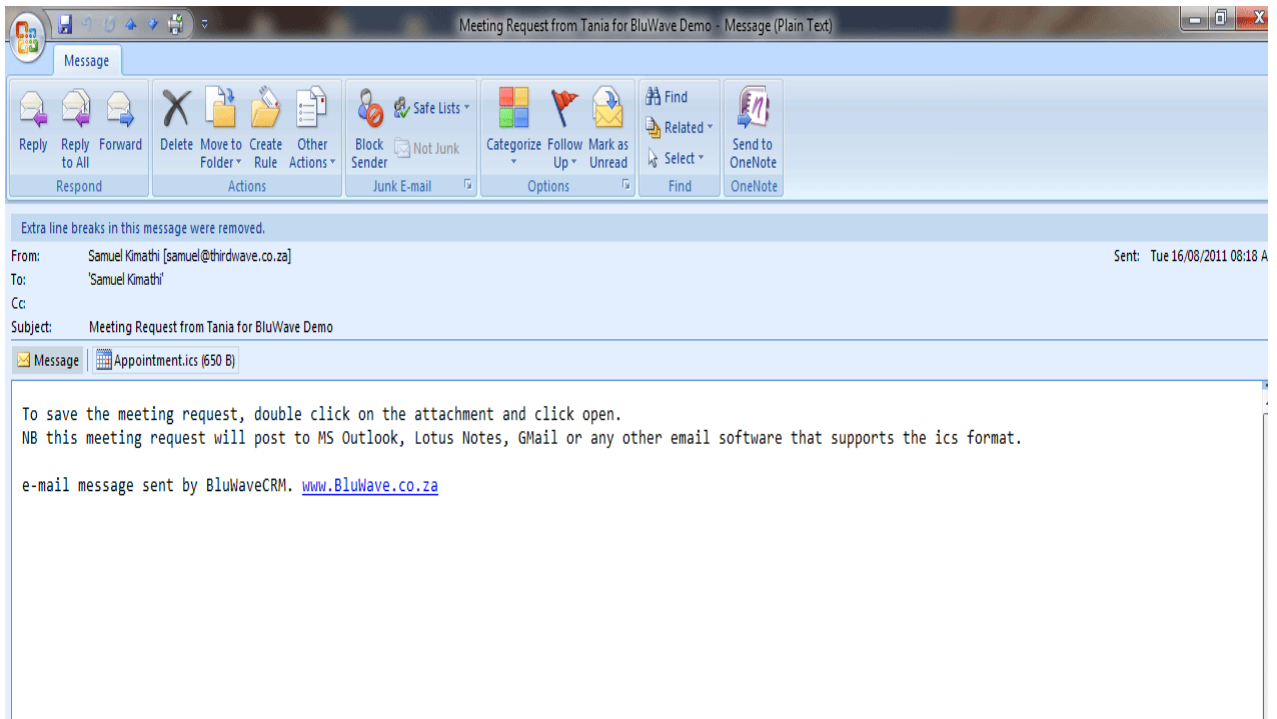


Now when you click download meeting request the system will go directly to the Accept form below



Appointment Invitation Emailed to the Customer

If you had checked the invite customer check box then your customer will receive the following email from you. Your customer can click on the attached Calendar file to accept the appointment into any .ics compliant calendar program including MS Outlook Calendar, Lotus Notes Calendar, Gmail Calendar etc.



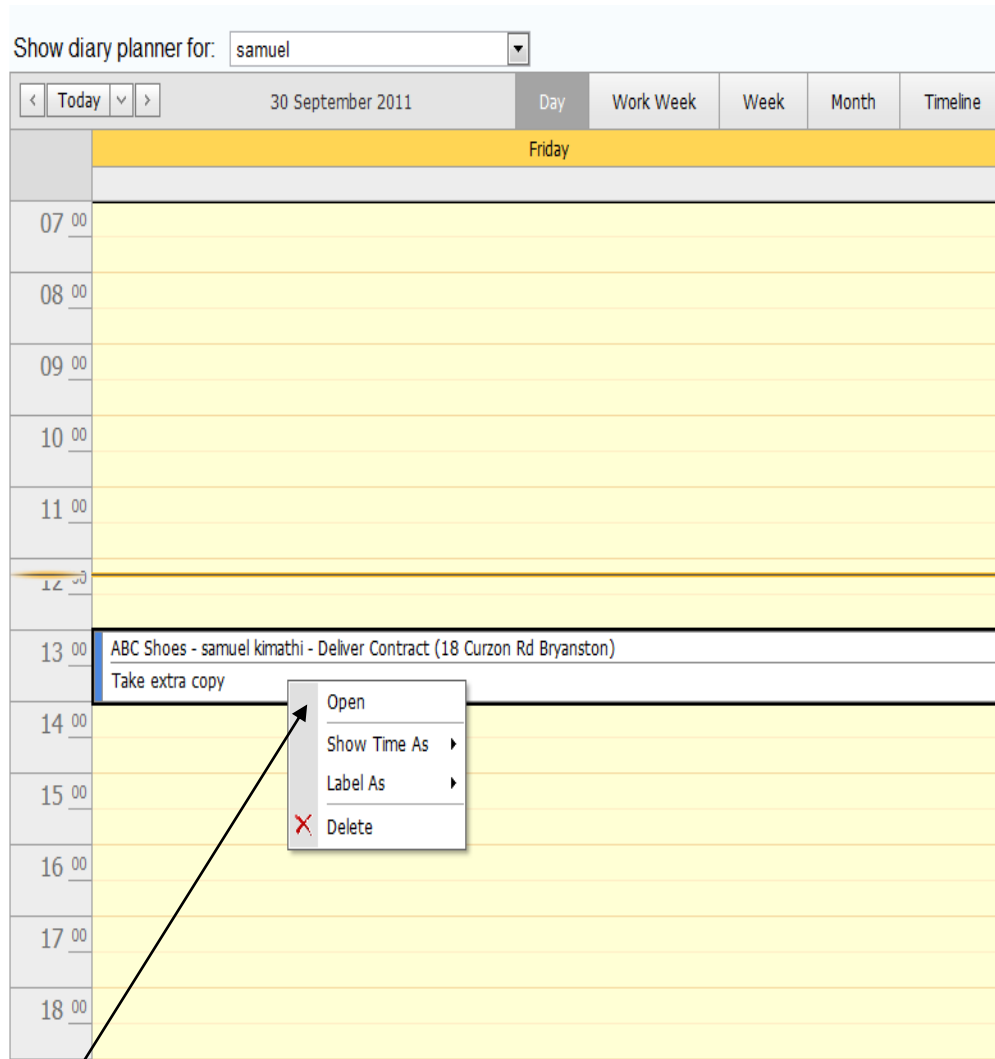
Editing BluWave CRM Appointments also Edits your Calendar Appointment

If you edit your appointment in BluWave, the system will edit your appointment in your local calendar you will have to download the adjustment and accept it as you did when booking the appointment. In addition, if your customer was invited, it will resend the appointment adjustment to the customer.

Edit an Activity




Click on Diary Planner to edit a task or appointment.



Right click on the activity and select Open


Make the necessary changes and click on the Update button.



Edit Appointments

Appointment Details * = Required Fields

Sales Staff:

Company: * 

Contact: * Invite Contact?

011 234 5674 082 414 9138 sheila@shezada.co.za

Location: [View Map](#)

Activity: *

Task?

Start Date:


End Date:

Activity is Scheduled in the Past. Defaulting to Completed

Note:

Completed?

You can also edit an activity from the company tab. Expand the **Scheduled Activities** list and click on the activity you wish to edit. It will open the same screen as above.



Edit Company

Company Detail

Company Name

Sales Staff

Category

Type

State

Source

Industry

Area

Account Number

Date Opened

Website

User Defined 1

User Defined 2

User Defined 3

User Defined 4

User Defined 5

User Defined 6

Contacts [New](#)

Scheduled Activities [New](#)

Date	Time	Activity	Contact	Note
04/04/2011	16:00	Call for Demo	Mr Denzil Govender	Call to book time
05/04/2011	20:42	Send Quote	Mr Denzil Govender	
08/04/2011	09:00	BluWave Demo	Mr Denzil Govender	
09/04/2011	10:01	Arrange Cust Visit	Mr Denzil Govender	Booking activity
09/04/2011	11:00	BluWave Demo	Mr Byron Cooke-Tonnesen	
11/04/2011	16:54	BluWave Demo	Ms Sheila Welch	test
12/04/2011	13:30	BluWave Demo	Mr Samuel Kimathi	
12/04/2011	13:30	BluWave Demo	Mr Samuel Kimathi	
18/04/2011	00:00	Call for Demo	Mr Byron Cooke-Tonnesen	

Completed Activities [New](#)

Also note that the “New” links on the scheduled and completed activity panels will allow you to create a new activity for this client; the company name will default

To Do List

To access a list of all your outstanding activities, click on the “To do list tab”

Home | **Activities** | Leads | Contacts | Companies | Opportunities | Reports | System Setup

Add new Activity | Diary Planner | **To Do List** | Send Email

To Do List

Show to do list for samuel Up to and including 30/09/2011

Start Date	Task?	Company Name	Contact	Activity	Days
Edit Delete 30/09/2011	<input type="checkbox"/>	ABC Shoes	samuel kimathi	Deliver Contract	0 Take extra c
Edit Delete 30/08/2011	<input type="checkbox"/>	ABC Shoes	samuel kimathi	Book Training	31
Edit Delete 30/08/2011	<input checked="" type="checkbox"/>	ABC Shoes	mr Sheila Welch	Quote Follow up	31
Edit Delete 28/08/2011	<input checked="" type="checkbox"/>	ABC Shoes	mr Sheila Welch	Quote Follow up	35 Follow up Q
Edit Delete 08/08/2011	<input checked="" type="checkbox"/>	CTP consulting	mr mark Anthony	Quote Follow up	53 Follow up Q
Edit Delete 07/08/2011	<input checked="" type="checkbox"/>	T-Systems	ms Laundry Mhlophe	Quote Follow up	54 Follow up Q
Edit Delete 05/08/2011	<input type="checkbox"/>	BVM marketing	mr Petrus	Deliver Contract	56
Edit Delete 03/08/2011	<input type="checkbox"/>	BTX consulting	mr samuel Kimathi	Deliver Contract	58 hhhbbdufjbd

Click on “Select” to edit or complete an activity.

The date field allows you to select which dates you want to view your “To Do” list for.

Once the activity has been completed, it will be moved from the To Do List to the **Completed Activities** panel under the respective company.

Completing your Activities

Edit Appointments Update Update & New Cancel

Appointment Details * = Required Fields

Sales Staff: samuel

Company: ABC Shoes *

Contact: Sheila Welch mr * Invite Contact?

011 234 5674 082 414 9138 sheila@shezada.co.za

Location: 18 Curzon Rd Bryanston [View Map](#)

Activity: Quote Follow up *

Task?

Start Date: 18/10/2011 14:00

End Date: 18/10/2011 00:00

Note: Follow up QuoteNo: 1003

Completed?

Update Update & New Cancel

Edit the Activity in the usual way, tick the completed box and click on the Update button.

Should you want to create a new Appointment/Task for the same client, click on the **Update & New** button.

We have spent some time making the “completing activities process” more intuitive by adding some artificial intelligence to the process of booking and completing activities as follows:

If a user edits an activity where the activity date (for tasks) and time (for appointments) is in the past, the system automatically “checks” the “complete” check box; this makes it easier for users to complete activities.

If however you edit an activity because the time or date of the appointment has changed and thus you change the date or time to a future date, the system will un check the “complete” check box.

If you are logging and completing an activity that happened in the past but was not initially entered to the system, BluWave CRM will note that the activity’s date and/or time is in the past and will once again auto complete it. It will also display indicating that you are entering an activity that occurred in the past.

If an activity is changed to a task, the invite customer check box is unchecked and disabled. The invite customer function is only applicable to appointments.

Email Sending

BluWave CRM allows you send emails to your clients and also saves a copy of the email sent under the “Completed Activities” panel of the client.

To send an email, click on the “Send Email” tab under Activities or use the “Send Email” function available under Quick Create.

The screenshot shows the BluWave CRM interface. At the top, there are navigation tabs: Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, and Financials. Below these, there are sub-tabs: Add New Activity, Diary Planner, To Do List, and Send Email. The main area displays a calendar for Tania Cooke-Tonnesen on 19 March 2012. A 'Quick Create' sidebar is open, showing a list of activity types: Appointment, Task, Company, Contact, Lead, Opportunity, Quote, and Send Email. An arrow points from the 'Send Email' option in the sidebar to the 'Send Email' sub-tab in the top navigation bar.

Alternatively, click on the **hyperlink** on the contacts panel of the Edit Companies Form as shown below to email a specific contact person.

The screenshot shows the 'Edit Company' form. At the top, there are buttons for 'Update', 'Cancel', and 'Print Card'. The 'Company Detail' section contains various fields for company information, including Company Name (ABC Manufacturing), Account Number (ABE001), Sales Staff (Tania Cooke-Tonnesen), Date Opened (05/04/2011), Category (Customer), Website, Type (A Type), User Defined 1 (0), State (Active Customer), No of Pot Users (0), Source (Marketing Promotion), Financial Year End, Industry (Pharmaceuticals), User Defined 4, Area (JHB -Eastern Suburbs), User Defined 5, Currency to Quote (USD), User Defined 6, Payment Terms, and Price Factor (1). At the bottom, there is a 'Contacts' panel with a table of contact information. An arrow points from the text above to the 'E-Mail' column of the contacts table.

Contact	Name	Tel	Cell	Designation	E-Mail
Delete	4	Cooke	011 567 2234		
Delete	5	Byron Cooke Mr	011 567 2234	082414 9138	Director byron@thirdwave.co.za
Delete	2	Denzil Govender Mr	011 462 6871	098353	Manager denzil@thirdwave.co.za

Step 1: Select Recipients

You can select the recipients by clicking on the “To, Cc, or Bcc” buttons.

Step 1: Click on the “To, Cc, or Bcc” buttons to search for the contacts to email.

Step 2: Click on the magnifying glass to search for the company

Step 3: Search for a company by typing at least the first two letters of the name and click “Go” then select the company from the list.

	Company Name	Acc.No
Select	ABC Computers	AMP001
Select	ABC Manufacturing	ABE001
Select	ABC Shoes	ALP001
Select	ABC Shoes	
Select	abchansenafrica	

Step 4: Select the Contacts to Email. All the contacts at the selected company with an email address will display, select all the contacts that are to be included in “To” by ticking the “check box” and click the “Add To” button. Repeat for CC and BCC.

The screenshot shows the 'Add Email Recipients' page in the BluWave CRM. The navigation bar at the top includes Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, and Financials. The main content area has a search box with 'ABC Manufacturing' entered. Below the search box, there are radio buttons for 'Company Contacts' (selected) and 'Internal Staff'. To the right of the radio buttons are buttons for 'Add To', 'Add Cc', and 'Add Bcc'. Below these buttons is a list of contacts with checkboxes: Byron Cooke - Director, Denzil Govender - Manager, Samuel Kimathi - Implementation Consultant, and Tania Cooke - Marketing Manager. The 'Internal Staff' radio button is unselected.

You may click the “magnifying glass again to select additional companies to email if required.

Step 5 (Optional): To include internal recipients on the email, select the “Internal Staff” radio button and this will show a list of all the “Users” of your **BluWave crm** system.

Add the required ones by ticking on their check boxes and add them to either “To, Cc or Bcc” recipients.

The screenshot shows the 'Add Email Recipients' page in the BluWave CRM. The navigation bar at the top includes Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup, and Financials. The main content area has a search box that is empty. Below the search box, there are radio buttons for 'Company Contacts' (unselected) and 'Internal Staff' (selected). To the right of the radio buttons are buttons for 'Add To', 'Add Cc', and 'Add Bcc'. Below these buttons is a list of internal staff members with checkboxes: Alex, byron, Deez, John smith, Samuel Kimathi, and Tania Cooke-Tonnesen. The checkbox for Tania Cooke-Tonnesen is checked.

Step 6: Click on “Done” once finished.

Step 7: Type in the Subject and the Message, Attach Documents & Send. The system also allows you to attach documents to the email from the document management area of the CRM (refer to the Document Management documentation).

Click on the **“Send and Close”** button to send the email and exit from the email screen or **“Send”** and this will clear up the email screen to send a new email.

Send Email Send Send and Close

Create Activities for Emails

To : denzil@thirdwave.co.za;

Cc : tania@thirdwave.co.za;

Bcc :

Attach Bluwave Software.pdf;

Subject : Proposal

Message :

Dear Denzil

Please find the proposal document attached.

Regards
Tania Cooke-Tonnesen
Manager
Tel: 011 462 6871
Cell: 082414 9138
Email: tania@thirdwave.co.za

Send Send and Close

You can also file emails from any email software program – either desktop email clients or web-based email client software including: Outlook, Lotus Notes, GroupWise, Google Mail.

How To Use the Email Filing Function

1. Saving an Outgoing Email

If you are sending an email from your email client to one of your contacts and want to record the email in BluWave simply **BCC** the email to the following email address: emailfiling@bluwave.co.za **BluWave crm** will then save the email as a completed activity under the client.

NB: To save successfully, the contact person needs to be already loaded on BluWave with this email address.

The screenshot shows an email composition window. On the left is a 'Send' button. The 'To...' field contains 'Denzil@Thirdwave.co.za;'. The 'Cc...' field is empty. The 'Bcc...' field contains 'emailfiling@bluwave.co.za;'. The 'Subject:' field contains 'Project Planning'. The email body text is as follows:

Hi Denzil

As per our telephonic conversation, or quote is as follows:

- Install Advantage on a new computer

1 hour travel @ R650 + 1 hour on site @ R650 = R1300 (Ex VAT)

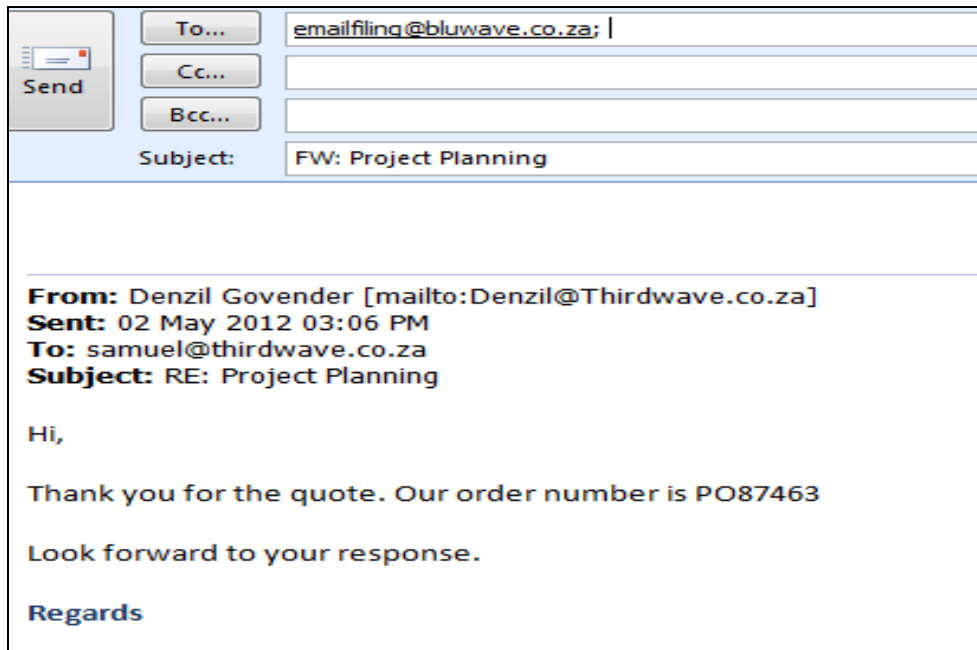
Please can you reply with an order number so we can schedule this job.

The email will then be saved as follows under the client's completed activity panel:

Completed Activities					New
Date	Time	Activity	Sales Rep	Contact	Note
02/05/2012	15:02	Email Sent	Samuel Kimathi	Denzil Govender	Subject: Project Planning Hi Denzil As per our telephonic conversation, or quote is as follows: - Install Advantage on a new computer 1 hour travel @ R650 + 1 hour on site @ R650 = R1300 (Ex VAT) Please can you reply with an order number so we can schedule this job. Samuel Kimathi Application Consultant Third Wave Software (Pty) Ltd Tel : 011 462 6871 Fax : 011 462 6886 Cell: 079 549 3304 Email : samuel@thirdwave.co.za Advantage CRM - CRM with Passion cid:312215312@18032009-2AE3

2. Saving a Received Email

To save an email that you have received in your email client, **Forward** that email to emailfiling@bluwave.co.za.



BluWave crm will then save the email as a completed activity under the client's activity history panel as shown below. Again the contact from whom the email was received from needs to exist on BluWave CRM with the email address that the message came from.

Completed Activities ▲ New				
Date	Time	Activity	Sales Rep	Contact
02/05/2012	15:13	Email Received	Samuel Kimathi	Denzil Govender

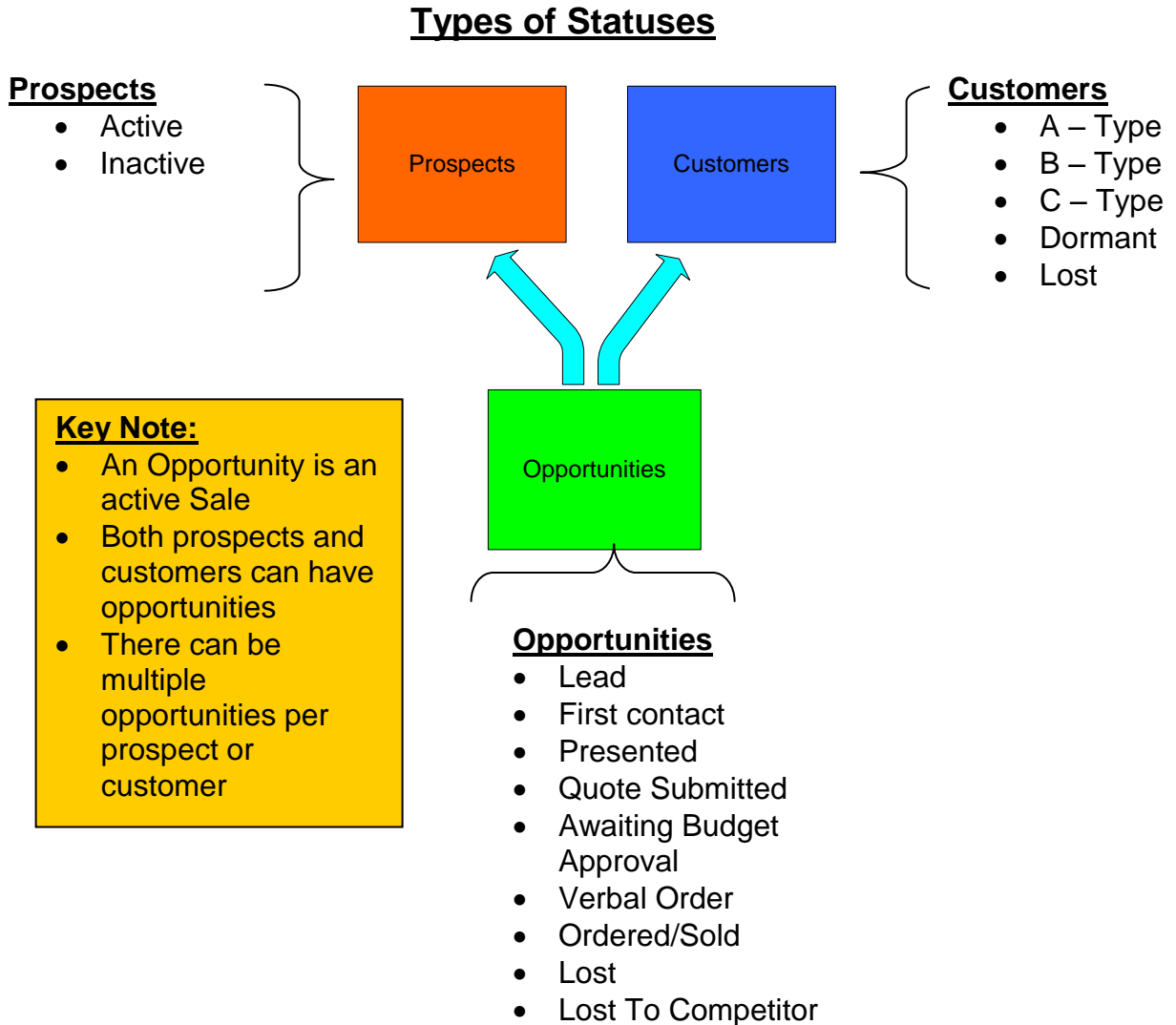
Subject: FW: Project Planning From: Denzil Govender [mailto:Denzil@Thirdwave.co.za] Sent: 02 May 2012 03:06 PM To: samuel@thirdwave.co.za Subject: RE: Project Planning Hi, Thank you for the quote. Our order number is PO87463 Look forward to your response. Regards Denzil Govender Senior Developer Third Wave Software (Pty) Ltd Tel : 011 462 6871 Fax : 011 462 6886 Cell: 072 216 9038 Email : HYPERLINK "mailto:Denzil@Thirdwave.co.za"Denzil@Thirdwave.co.za Advantage CRM - CRM with Passion Description: cid:312215312@18032009-2AE3 From: Samuel Kimathi [mailto:samuel@thirdwave.co.za] Sent: 02 May 2012 15:03 PM To:

7. OPPORTUNITY TRACKING

Prospect - A Client you are trying to sell to.

Customer – A Client you have already sold to.

Opportunity – A deal which has a value and status which could be for a Prospect or a Customer.



Opportunity Tracking

Begin by clicking on the Opportunity Tab. Start typing the company name in the Search box; you need to enter at least 2 characters. You can also select a letter in the alphabet to view a list of companies beginning with that letter. This will enable you to view your opportunities by Company.

Add Opportunity

Click on Add New Opportunity to create a new Sales Opportunity.

The screenshot shows the 'New Opportunity' form in the BluWave CRM. The form is titled 'New Opportunity' and includes a 'Save' and 'Cancel' button. It contains several fields: Sales Staff (samuel), Company (ABC Shoes), Contact (samuel kimathi), Opportunity Name (10 user), Expected Order Date (30/09/2011), Product (10 - 10 user system), Status (Quote), Probability % (90), Value (2000), Next Activity (Quote Follow up), and Activity Date (07/10/2011). There is also a 'Note' field and an 'Attachment' button. The form is surrounded by navigation tabs (Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, System Setup) and a sidebar with a search box, quick create, and calendar.

Click on the Attachment button to attach a quote or any other document to the opportunity. The documents to be attached have to be preloaded onto the BluWave server via the document management feature.

Click on **“save”** to capture this opportunity and should you wish to create another opportunity for the same client, click on **“Save & New”**. This will clear the page and allow you to enter the new opportunity.

View Opportunities

Click on view opportunities to get a list of opportunities.

The screenshot displays the BluWave CRM interface. At the top, there is a navigation bar with tabs for Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, and System Setup. The 'Opportunities' tab is active. Below the navigation bar, there is a search bar and a filter dropdown menu. The filter menu is open, showing options: All Opportunities, Please Select Filter, All Opportunities, Recently Added, My Opportunities, Branch Opportunities, Closing This Month, and Closing Next Month. Below the search and filter options, there is a table of opportunities. The table has columns for Company Name, Rep, Pot. Value, Exp. Date, Status, and Product. The table contains several rows of data, including SuperWave, BluWave Software, ABC Shoes, Test, Phonatics, Alex Ice Cream Distributors, and BluWave Software. Each row has an 'Edit' and 'Delete' link next to the company name. On the left side of the page, there is a sidebar with a search bar, a 'Quick Create' button, and a calendar widget for May 2011.

Company Name	Rep	Pot. Value	Exp. Date	Status	Product
Edit Delete SuperWave	Quin Bergh	20000	14/04/2011	Lead	BluWave 15 User Solution
Edit Delete BluWave Software	byron	30000	18/04/2011	First Demonstration	BluWave 10 User Solution
Edit Delete ABC Shoes	Quin Bergh	120000	23/04/2011	First Demonstration	BluWave 10 User Solution
Edit Delete Test	Alex	3200000	30/04/2011	Quoted	BluWave 5 User Solution
Edit Delete Phonatics	Denzil Govender	820000	30/04/2011	Quoted	BluWave 5 User Solution
Edit Delete Alex Ice Cream Distributors	Alex	130000	30/04/2011	First Demonstration	BluWave 10 User Solution
Edit Delete Phonatics	byron	50000	30/04/2011	Verbal Order	BluWave 10 User Solution
Edit Delete BluWave Software	Denzil Govender	0	30/04/2011	Lead	BluWave Software 1 to 5
Edit Delete BluWave Software	Tania	4000000	31/05/2011	Lead	BluWave 5 User Solution
Edit Delete BluWave Software	Tania	1500000	31/05/2011	First Demonstration	BluWave 15 User Solution

Select **Edit** on the relevant opportunity to open up the opportunity for editing.

The filters on the right can be used to access opportunities captured as follows:

- **All opportunities** filter will give a list of all opportunities entered for all clients.
- **Recently Added** filter will only show the last 5 added opportunities for all clients.
- **My opportunities** filter will give a list of opportunities entered by the sales person currently logged into the system.
- **Closing this month** will show all opportunities which have their expected order day set for the end of the current month.
- **Closing next month** will show those opportunities with an expected order date set for the end of the next month.

Edit Opportunity

Home | **Activities** | Leads | Contacts | Companies | **Opportunities** | Reports | System Setup

Add New Opportunity | View Opportunities | New Quote |

Search

Search

Within **Please Select...**

Quick Create

Please Select...

Calendar

September 2011

Mo	Tu	We	Th	Fr	Sa	Su
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

New Opportunity

Opportunity Details * Required Fields

Sales Staff: samuel * Status: lost *

Company: ABC Shoes * Probability %: 90

Contact: samuel kimathi * Value: 2000

Opportunity Name: 10 user Next Activity: Quote Follow up

Expected Order Date: 30/09/2011 Activity Date: 07/10/2011

Product: 10 - 10 user system * Date Sold/Lost: 30/09/2011

Note: Price Issue

Reason Lost:

Competitor:

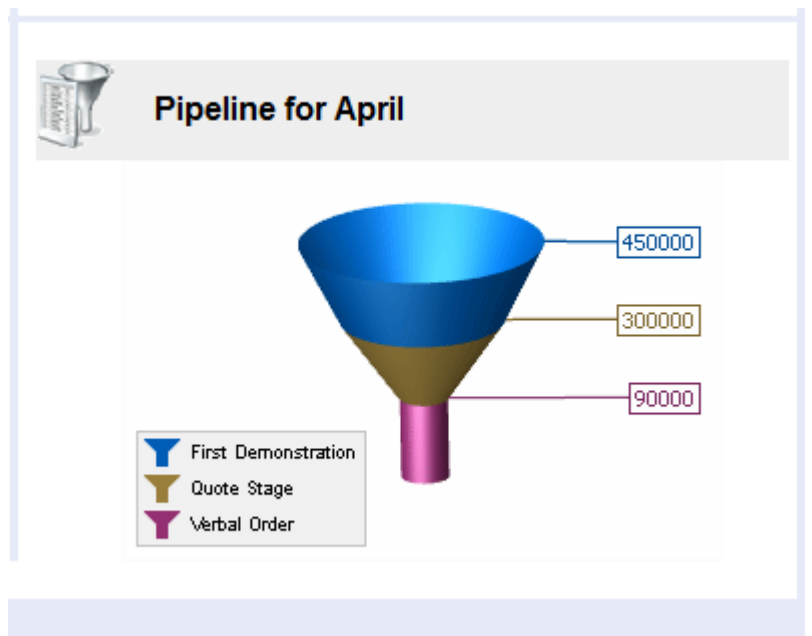
Attachment:

- In this screen you can change the expected order date, enter the potential sale value and probability of this opportunity.
- The status field is used to monitor your progress. This is very useful for status reports.
- Advantage will also enable you to attach files related to the opportunity.
- Click on the Update button to save the changes.

Opportunity Tracking (Managing the Sales Pipeline)

Use the Opportunity Tracking functions to manage new business acquisition.

- Define your own sales process for tracking the progress of your sales pipeline.
- The system generates a new business forecast based on expected order dates and sales probability percentages.
- Each sales person can view his pipeline visually on his homepage. Additional graphing on the sales person's dashboard details progress against target.



8. Quotes Automation

The Quotes Automation function generates a quote that can be emailed as a .PDF file to the customer. When a quote is generated the system automatically creates a related opportunity in your sales pipeline and at the same time a follow-up activity (action item) is also automatically generated. There is a Quote Set up function under the system set up tab that allows you to customize the look of the quotation.

Use the “New Quote” menu under opportunities to create a Quote, alternatively use the Quick create menu You can also create a quote by clicking on the “New Quote” link under the Company’s opportunity panel.

Use “New Quote” menu option to create a new quote.

The “Quick Create” menu also allows you to create a quote

Alternatively, if you have already used an “opportunity” then use the “Create Quote” link of the opportunity.

Use the “Create Quote” link to create a quote for an existing opportunity

Quote Detail – Step 1

Complete the quote header details and then proceed to step 2.

Quote Detail - STEP 1 Cancel

Quote Details * Required Fields

Quoted By	Samuel Kimathi	Quote No	
Company	TRUCKS LTD	Date	02/04/2012
Contact	mike john mr - Manager	Valid For	14
Quote Status	Proposal Submitted	Expire on	16/04/2012
Quote Description	Quoted Products	Follow up Activity	Quote Follow Up
Exp Order Date	30/04/2012	Follow up Date	05/04/2012
Probability %	70	Currency to Quote	Rands 1
Delivery	2 weeks	ROE	Rands 1
		Payment Terms	

Continue to Step 2

Company - Select the company for whom you are quoting by clicking on the “magnifying glass” button.

A **contact person** is required – select from list of contacts at this company.

Quote Status – select the current status of this opportunity.

Quote description – this is used as the subject line of the emailed quote – it should indicate what you are selling.

Expected Order Date – Date when you expect to get the order. This defaults to the last day of the current month to keep the opportunity in the sales pipeline for the month.

Probability – A percentage to indicate the chance you have to close the deal.

Quote No – the system will insert the next quote number for your company onto the quote as soon as you start editing and updating then quote.

Validity – shows how long the quote is valid for hence affecting the expiry date.

Follow up activity/ Date – select the activity that needs to happen after sending the quote E.G Quote follow up and select the date the activity is to happen

Currency to Quote/ Rate of Exchange – Select the currency you wish to quote in and the rate of exchange from the list. These have to be setup under the “System Setup” beforehand. The system will automatically default to Rands.

Payment Terms – Select the payment terms from the list. These also have to be created under “System Setup”

Click on “Continue to Step 2” once done

Add Quote Items – Step 2

Select the item you wish to quote and then click the “Add to Quote” button – repeat this for each quote line. The Quotes automation allows you to have multiple offers on the quote. The system also allows you to include/exclude the value of the different offers to the final potential value of the quote.

Add Quote Items - STEP 2

Add Quote Items - TRUCKS LTD Quote#: 1017 Currency To Quote: Rands

Group: BLuWaveCRM Code: BWCRM10: BluWave CRM 10-14U Desc.: BluWave CRM 10-14User

Qty 1 Cost 0.00 Selling R 20000 Factor 1 Adjusted Price R 20000.00 Disc. % 5

Attachment: No Narrative User training for maximum of 10 delegates per course.
Picture to Attach

Add To Quote

Offer : 1 of 1 Next Offer

Offer Gross Profit : Label Include Offer in Potential Value? Quote Gross Profit : 0
Offer Total : Label Heading : Quote Total : 0

No. of Quoted Items: 0 Continue to Step 3

Click "Add To Quote" button. Repeat for all items to be quoted. Then proceed to Step 3

Select a Product Group – if you make a selection from this drop down then the product code and product description drop downs will be filtered by the selected group. If you do not select a group the product code and product descriptions drop downs will contain all products.

Select a Product Code or Product Description – select the item you wish to quote using either the product code or descriptions drop down.

Narrative - The product “Narrative” will display if it has been set up. You can customize the narrative here if you wish to change it for this particular quote.

Price – The cost price (if set up on the product list) and selling price will show here.

Quantity – Enter the number of items you are quoting on.

Factor – The factor allows you to inflate the price of the product to cover for risks that are not accommodated for in the products costs. E.g. when transporting goods to another country, you may use a factor of 1.2 to inflate the price by 20 %.

Discount – Enter discount to be offered on the line item and this will be subtracted from the price.

Click Add To Quote Button ...


The item selected will display in the quoted items list as shown below. Continue adding all the items you wish to quote on.

Add Quote Items - TRUCKS LTD Quote#: 1017 Currency To Quote: Rands

Group: * Code: Desc.:


Qty Cost Selling R Factor Adjusted Price R Disc. %

Attachment: No Picture to Attach Narrative

Offer : 1 of 1 Next Offer 

Offer Gross Profit : 26000 Include Offer in Potential Value? Quote Gross Profit : 26000

Offer Total : 26000 Heading : Quote Total : 26000

No. of Quoted Items: 2 Continue to Step 3 

Code	Description	Qty	Price	Disc.%	Narrative
Delete BWCRM10	BluWave CRM 10-14User	1	R 20000	0	Includes user training.
Delete BWCRM	BluWave CRM	1	R 6000	0	Periodic onsite management reviews

Adding Additional Offers



You can have multiple offers on the same quote. Click on "Next Offer" and this will allow you create a new offer for the same quote. Repeat the steps above to add line items to the second offer and this will also show on the final quote under a different heading.

Add Quote Items - TRUCKS LTD Quote#: 1017 Currency To Quote: Rands

Group: BLuWaveCRM Code: Desc.:


Qty Cost Selling R Factor Adjusted Price R Disc. %

Attachment: No Picture to Attach Narrative

 Previous Offer Offer : 2 of 2 

Offer Gross Profit : 40000 Include Offer in Potential Value? Quote Gross Profit : 66000

Offer Total : 40000 Heading : Quote Total : 66000

No. of Quoted Items: 1 Continue to Step 3 

Code	Description	Qty	Price	Disc.%	Narrative
Delete BWCRM30-40	BluWave CRM 30 - 40 Users	1	R 40000	0	Includes training and automatic updates

Enter the "Heading" of the second offer here. Also indicate whether you want the second offer's value to be included in final potential value of the quote or not by selecting/deselecting the check box

Once done, click on "Continue to Step 3"

Quote Details – Step 3

This step lists all the quoted items with a quote total. Multiple offers can also be viewed here and you can edit and delete line items from the quote using the edit and delete items on each line item.

Step 3 will also show the Quote Header details as they were on step 1 to allow you change details e.g. Delivery should this be necessary.

Quote Details - STEP 3

Quote Details

Quoted By: Samuel Kimathi

Company: TRUCKS LTD

Contact: mike john mr - Manager

Quote Status: Proposal Submitted

Quote Description: Quoted Products

Exp Order Date: 30/04/2012

Probability %: 70

Delivery: 3 weeks

Payment Terms:

*** Required Fields**

Quote No: 1017

Date: 02/04/2012

Valid For: 14

Expire on: 16/04/2012

Follow up Activity: Quote Follow Up

Follow up Date: 09/04/2012

Show Product Discount?: No

Currency to Quote: Rands 1

ROE: Rands

Template: Bryanston

Back to Step 2 (Add Quote Items)
Recalculate
Terms
Select Offer : 1
Save and Preview Quote

Seq	Product	Description	Narrative	Qty	Price	Disc.%	Total	Att	
Edit Delete	1	BWCRM10	BluWave CRM 10-14User	Includes user training.	1	R 20000	0	R 20000	<input type="checkbox"/>
Update Cancel	2	BWCRM	BluWave CRM	Periodic onsite management reviews	1	R 6000	0	R 6000	<input type="checkbox"/>
VAT <input checked="" type="checkbox"/> 14							Total R	26000.00	
							VAT R	3640.00	
							Grand Total R	29640.00	

If you “Edit” a quote line you can change the sequence number to change the order of the quote lines on the quote.

You can also go to “**Back to Step 2**” to add more quote items

View the different “**Offers**” by selecting the required one from the list.

Should the **Currency to Quote or Rate of Exchange** change, use the “**Recalculate**” button to refresh the price and the currency symbol.

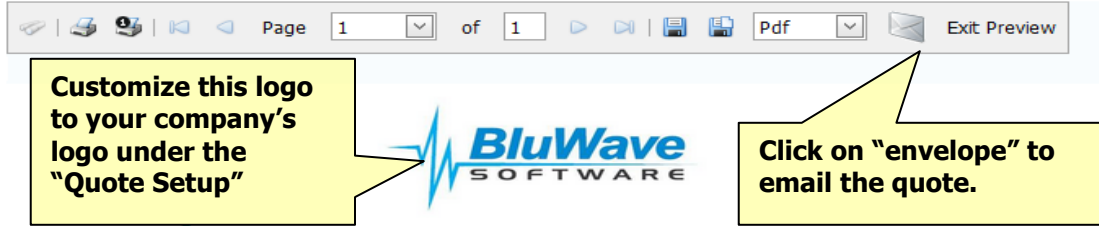
Optional Terms and Conditions can be added to the quote by selecting them from the “**Terms**” button. This will have to be pre added to the system by the administrator.

Uncheck the “**VAT**” check box to exclude it form the quote total or leave it checked to include it.

Click “Save & Preview Quote” to generate the quote.

Save & Preview Quote

The generated quote will preview as follows:



Quotation

Quote No:	1017	Date:	02/04/2012
To:	TRUCKS LTD	Valid for:	14 Days
Att:	mr mike john	Address:	18 Curzon Rd Bryanston
Tel:	011 234 5674	From:	Samuel Kimathi
Fax:		Tel:	
Cell:	076 421 6153	Cell:	079 549 3304
Email:	angela@thirdwave.co.za	Email:	samuel@thirdwave.co.za

Dear **mike**

Re: **Quoted Products**

We have pleasure in submitting our quotation as follows.

OFFER 1

Description	Qty	Price	Total Rands
BluWave CRM 10-14User - Includes user training.	1	R 20,000.00	R 20,000.00
BluWave CRM - Periodic onsite management reviews	1	R 6,000.00	R 6,000.00
		TOTAL (Ex Vat) :	R 26,000.00
		VAT :	R 3,640.00
		Total:	R 29,640.00

Emailing the Quote

Click on the Envelope button to email the quote – the system will email it to you as well as to the customer – you can add other addressees. The sender also receives a copy of the quote.

Ticking this check box saves the email sent under the activity history panel of the client

Email Quote

Create Activities for Emails

To :

Cc :

Bcc :

Attach :

Subject :

Message :

The subject line includes: the customer name, Quote number and the Quote description. The Body of the email contains the default message defined in the Quote Set up – but the user can edit the message before sending.

Quote Auto-Creates an Opportunity

When a quote is generated, the system automatically creates a related opportunity with a link to the quote. Click on the Quote Number (1007 below) to open up the quote and preview if required.

Leads | Contacts | Companies | **Opportunities** | Reports | System Setup

Opportunities | [New Quote](#)

Edit Opportunity

Opportunity Details

Sales Staff: Status:

Company: Probability %:

Contact: Value:

Opportunity Name: Next Activity:

Expected Order Date: Activity Date:


Product: Quote No: [1007](#)

Note:

Note that if you had created an opportunity before you generated a quote – you can edit the opportunity and add a quote to an existing opportunity by clicking in the quote number field of the opportunity.

Quote Auto Creates a Follow-Up Activity

When a quote is created the system automatically creates a follow-up activity for the sales person.

 **Quote Details - STEP 3**

Quote Details * Required Fields

Quoted By	<input type="text" value="Tania"/>	Quote No	<input type="text" value="1007"/>
Company	<input type="text" value="BluWave Software"/>	Date	<input type="text" value="02/06/2011"/>
Contact	<input type="text" value="Byron Cooke-Tonnesen Mr"/>	Valid For	<input type="text" value="14"/>
Quote Status	<input type="text" value="Quoted"/>	Expire on	<input type="text" value="16/06/2011"/>
Quote Description	<input type="text" value="New System for Reception"/>	Follow up Activity	<input type="text" value="Quote Follow up"/>
Exp Order Date	<input type="text" value="30/06/2011"/>	Follow up Date	<input type="text" value="05/06/2011"/>
Probability %	<input type="text" value="30"/>		

The follow-up activity is defined in quote set up – you can change it. The system also defaults a follow-up date but the user can change it.

9. Reports

There are various reports to choose from.
Click on the report you wish view.

The screenshot shows the BluWave CRM interface with the 'Reports' tab selected. The main navigation bar includes Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, and System Setup. The 'Reports' section is active, displaying a grid of report categories: Activities, Opportunities, Companies, and Leads. Each category contains a list of report links. The 'Completed Activities Report' link is highlighted. Below the report grid, there is a search bar, a quick create section, and a calendar for October 2011. At the bottom, there is a secondary navigation bar with Leads, Contacts, Companies, Opportunities, Reports, and System Setup, along with the text 'Version 1.0'. The 'Completed Activities Report' is displayed in a large window with the following fields: Branch (Johannesburg Branch), Sales Staff (Tania), Activity Type (dropdown), Start Date (dropdown), and End Date (dropdown). A 'Preview Report' button is located below these fields. At the bottom of the report window, there is a toolbar with icons for print, save, and other functions, along with a page indicator showing 'Page 1 of 0' and a dropdown for 'Pdf'.

Select the relevant Branch, Sales Staff, Activity if required and date range. Click on Preview Report button.

Completed Activities Report

Branch : Johannesburg Branch

Salesperson : Tania

Activity Description : Arrange Cust Visit

07/04/2011 SuperWave Mr Ross Botha
called and scheduled for next week

Total For Activity Type : Arrange Cust Visit 1

Activity Description : BluWave Demo

06/04/2011 BluWave Software Mr Denzil Govender
Presented BluWave solution for sales and senior management as well as national sales team. Interest in iPad - took that to demo as well. Market capital items - tenders - need to follow-up on tender awards.

Total For Activity Type : BluWave Demo 1

Activity Description : Customer Survey

05/04/2011 BluWave Software Mr Denzil Govender
Called re project progress - opp tracking going well - foll up on quotes side. Installed but no training done yet on it.

Total For Activity Type : Customer Survey 1

Activity Description : Present Proposal

01/04/2011 Diamond Products Mr Dales Son
Meet with Dale and Fin Dir go thru proposal reviewed - to start in May after Easter

Total For Activity Type : Present Proposal 1

Total For Salesperson : Tania 4

Total For Branch : Johannesburg Branch 4
