



# **Email Filing User Manual**

May 2012

## Email Filing with *BluWave* crm

This new feature allows you to automatically file email from your Email In- and Outboxes by simply CCing or BCCing the BluWave Server email address. Tracking customer relationships and sales in progress is now easier than ever before with *BluWave* crm.

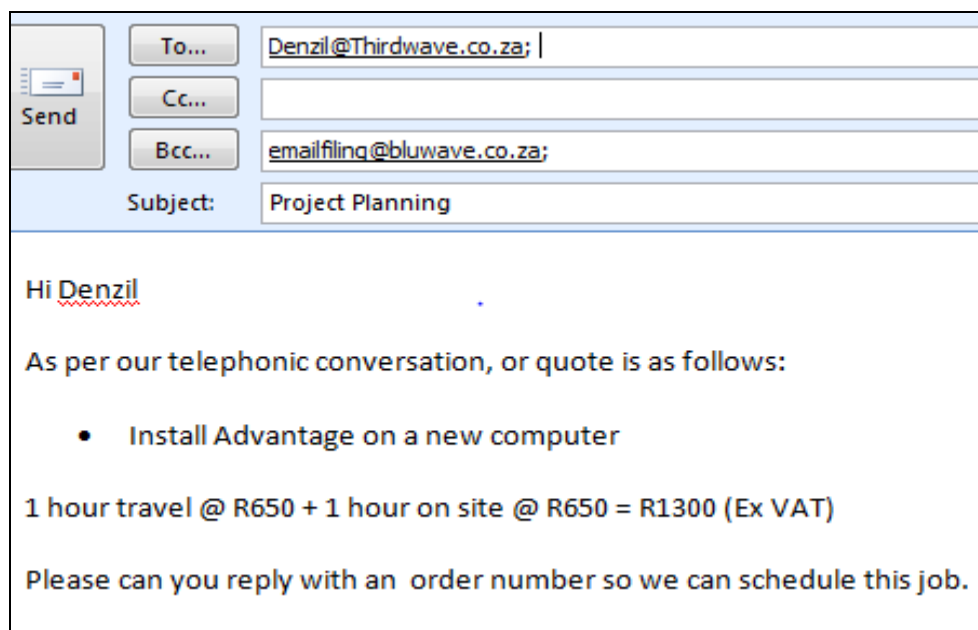
The filed emails will be stored as part of the activity history of the customer in chronological order with your telephone call and face to face call reports. You can file email from any email software program – either desktop email clients or web-based email client software including: Outlook, Lotus 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](mailto: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 client interface with the following fields:

- To...**: Denzil@Thirdwave.co.za; |
- Cc...**: (empty)
- Bcc...**: emailfiling@bluwave.co.za;
- Subject:** Project Planning

The email body contains the following text:

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 <span style="float: right;">▲ <a href="#">New</a></span>					
Date	Time	Activity	Sales Rep	Contact	Note
02/05/2012	15:02	<a href="#">Email Sent</a>	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](mailto:emailfiling@bluwave.co.za).

Send	To...	emailfiling@bluwave.co.za;
	Cc...	
	Bcc...	
Subject:		FW: Project Planning
<p><b>From:</b> Denzil Govender [mailto:Denzil@Thirdwave.co.za]  <b>Sent:</b> 02 May 2012 03:06 PM  <b>To:</b> samuel@thirdwave.co.za  <b>Subject:</b> RE: Project Planning</p> <p>Hi,</p> <p>Thank you for the quote. Our order number is PO87463</p> <p>Look forward to your response.</p> <p>Regards</p>		

**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 <span style="float: right;">▲ New</span>				
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:

END