



BLUECAMROO

EXTENDED PROFILE



OVERVIEW

BlueCamroo is a complete and fully integrated business solution that helps SMBs manage their customer relationships, their projects, and their business as a whole.

BlueCamroo combines CRM, Project Management, Customer Support Ticketing, Billing and Invoicing, Time Tracking, Expense and Resource management and much more.

BlueCamroo's goal is to provide the tools for businesses to effectively manage their business processes such as finding new leads, creating proposals, converting leads into customers, building and executing projects efficiently, tracking employee time spent on projects and tasks, billing customers, providing support and managing customer needs from end-to-end.

BlueCamroo aims to create a transparent environment to allow different departments to collaborate with each other in order to eliminate gaps and blind-spots within business processes.



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	BlueCamroo
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✓
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✓
SALES GAMIFICATION	✗
	✓

QUOTATION HANDLING	
TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✗
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✗
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✗
ANDROID APP	✗
NATIVE WEB APP	✓

HOSTING METHOD	
CLOUD	✓
ON-PREMISE	✗
FURTHER INFORMATION	
PRICING	\$49 / user / month (\$41 if billed annually)
IMPLEMENTATION TIMEFRAME	2 Months



SOFTWARE SCREENSHOTS

Consolidated Widgets Services | Jack
Search All Sections Advanced

Thursday, April 23, 2015

Main

What's New

Update Stream

My Lists

Tasks

Calendar

Email

Browse

Organizations

People

Leads

Customers

Suppliers

Opportunities

Sales Quotes

Sales Orders

Projects

Project Amendments

Invoices

Cases

Analyze

Dashboard

Reports

Marketing

Social Scout

Email Marketing

New Tasks Assigned to Me (3)

Task	Related To	Due	Assigned To
Review Contract Notes		2015-03-17 5:00 PM	Jack
Follow up	JalaTech	Today 11:30 AM	Sales Team
Follow up on new Website Lead	JalaTech	Today 12:30 PM	Sales Team

Current Tasks (10)

Task	Related To	Due	Status
Check & Approve Client Brief	Requirements UsherTech Project UsherTech	2015-02-05 5:00 PM	In Progress
Send the Letter	JalaTech	Today 11:30 AM	Not Started
Call Contact	J&J Widgets Johnston & Johnston	Today 12:30 PM	Not Started
Call Contact	Jala Widgets JalaTech	Today 1:30 PM	Not Started
Check & Approve Client Brief	Requirements TJ's Widgets Morgan Industries	Today 5:00 PM	Not Started
Check & Approve Client Brief	Requirements Nordby Widgets Nordby Tech	Today 5:00 PM	Not Started
Update Reports	BlueTech	2015-04-24 5:00 PM	Not Started
Send the Letter	Boring Widgets	2015-04-24 5:30 PM	Not Started
Check & Approve Client Brief	Requirements Fitz Widgets Fitz Tech	2015-04-27 5:00 PM	Not Started

Undated Tasks (2)

Task	Related To	Status
Calling Maddy	Madelyn Wilkins	In Progress
Finish Proposal	Codger Widgets Codger Enterprises	Not Started

Current Events (2)

This Week						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
19	20 Monday Morning Meet...	21	22 Afternoon Coding Sess...	23	24	25

April 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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

To Dos

- [Buy Printer Ink and Paper](#) Sep 12
- [Rhonda's Birthday Party](#) Sep 16
- [Clean up some files](#)
- [Buy eggs](#)

[List of To Dos](#)

[Add a list](#)

Consolidated Widgets Services - Carlo

Opportunities and Sales

Open Opportunities
19 (Widgetset Est: \$2,375,000)

Open Opportunities
33 (Est: \$4,474,400)

New Opportunities
3 (Est: \$4,200,000)

Opportunities Closed
2 (Est: \$200,000)

Opportunities Closed (West)
2 (Est: \$200,000)

Questions Answered
3 (Est: \$4,744,000)

Total Sales
\$4,744,000

Opportunity Phase	At Start of Month	Change (v.f.)	Today	Weighted Value (Revenue x Probability)	Change (v.f.)	Today	Opportunity Value (Revenue)	Change (v.f.)	Today
Preparation	12	2	14	0	0	20,000	0	0	13,750
Qualification	2	0	2	2,000	0	20,000	0	0	20,000
Proposal	0	0	0	0	0	0	0	0	0
Question Submitted	1	0	1	515	0	1,000	0	0	1,000
Agreement	0	0	0	0	0	0	0	0	0
Contract Signed	0	0	0	0	0	0	0	0	0
Total Pipeline Value	17	2	19	2,575	0	2,375	35,750	0	37,500

Test Sales (West Region)
42,761

Most Recent Opportunities

Customer	Name	Estimated Value	Close Date
Heart Patients	101 (Closed)	1,000	2015-02-28
Heart Health	100 (Closed)	400	2015-02-28
ABC Corp	100 (Open)	0	2015-03-31
Charlie Widgets	100 (Closed)	1,000	2015-02-28
ABC Corp	100 (Open)	400	2015-03-31

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Completed Projects

New Projects
3

Completed Projects
77

Customer	Name	Owner	Value
Heart Health	100 (Closed)	Carlo	2,000
ABC Widgets	100 (Closed)	Carlo	0
ABC Widgets	100 (Closed)	Carlo	1,000
ABC Widgets	100 (Closed)	Carlo	1,000

Slipping Projects

Customer	Name	Owner	Overdue Days
Heart Health	100 (Closed)	Carlo	15
ABC Widgets	100 (Closed)	Carlo	15
ABC Widgets	100 (Closed)	Carlo	15
ABC Widgets	100 (Closed)	Carlo	15

Most Open Cases

Name	Open Cases	Closed Cases
ABC Widgets	2	0
ABC Widgets	0	0
ABC Widgets	0	0
ABC Widgets	0	0
ABC Widgets	0	0

Unassigned Tickets

Name	Unassigned	Applied
ABC Widgets	0	0

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2015 Widgets

Qualification | 10%

Status Update

I've looked through the email and will begin setting up our proposal.

Update Stream

Jack posted an update about an email Today @ 3:50 PM

Joe Blue Decision Maker 911 532 8797

Abigail Mills Influencer

Jack added an update Today @ 3:45 PM Phase: Qualification

I've spoken at length with both Joe Blue and Abigail Mills about this, and they're ready to refresh their Widgets for 2015. I've attached the files I've sent them as a preview.

- Our next step is to get a detailed list of what they want and deliver a quote.
- Nicole Gray will take point on the technical aspects, we'll need an inventory too.
- Luke Gray I need you to go over the documents before we both sit down with them.

Contact Roles

- Joe Blue Decision Maker 911 532 8797
- Abigail Mills Influencer

Team Members

- Jack Team Lead

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Canfield Widgets Project

Project Circular

Project Details

Customer: Carlo

Project Start: 2015-02-01

Project End: 2015-02-28

Project Manager: Carlo

Project Status: On Track