

## What's New in BlueCamroo?

The August BlueCamroo update concentrates on bringing greater control and oversight when BlueCamroo is being used by multiple users. The most noticeable change is the **Snapshot** page, which can be the default landing page when you open any record (a lead, account, etc.). Additionally, we've added a new option to Social Network Scout called **Mentions**. The Channel Search bar is now accessible directly as buttons with pop-up menus.

Please read below for detailed overviews of these updates, and how to take advantage of them in your BlueCamroo account.

If you have any comments on these changes or have feature suggestions you'd like to put forward for future updates, please [visit our forums](#) or [email us](#).

## Snapshots



Need a quick overview of what's going on with a Lead, Account, Contact, Opportunity, Project, or Case? BlueCamroo now provides a new **Snapshot** option. Click on a record and then click the **Snapshot** button on the **Left Toolbar**. **Snapshots** give you an instant summary of current activities, messages, notes, the records change log (history), and other details depending on record type.

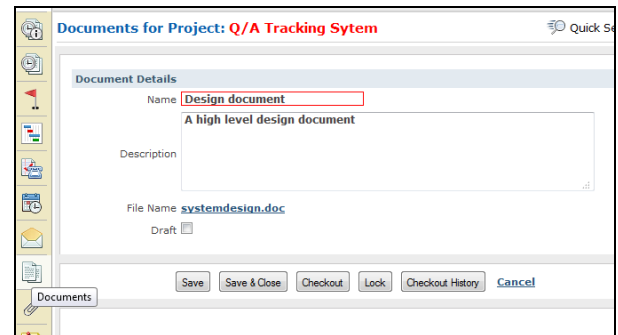
**Tip:** If you would like the Snapshot to always appear first when you open a record, visit **Setup > Personal Setup > Personal Preferences**. Under the **First Page to Display** area, select **Snapshots** for each section desired. Click **Save**, then log out and log back in for the changes to take effect.

## Left Toolbar Record Counts

Previously the **Left Toolbar** displayed record counts. For example, the Account **Messages** button displayed the number of messages in an account's inbox. This number, however, only captured the "top level" message count and did not take into consideration messages associated with sub-records like contacts and projects. We've removed the counts and instead now display key counts under the **Snapshot** pages with additional information (e.g., unread or overdue records).

## Managing Project Documents

This release we've made some changes to Projects to help you manage shared documents better when multiple users have access to the project record.




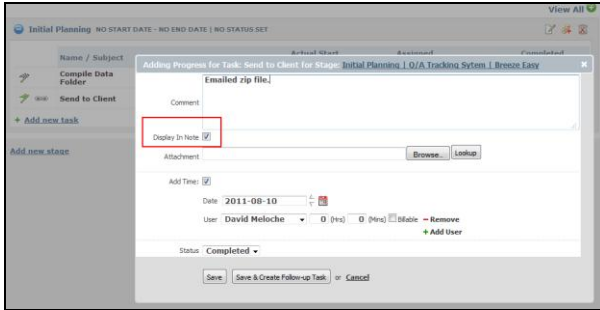
The **Projects** section now offers a **Documents** option. The **Documents** section is similar to the **Attachments** feature but provides the ability to check documents in and out, lock documents (prevent them from being checked in/out), maintain a version history, and leave user comments on each document details page.

The **Documents** feature gives you greater control over sharing important project-related documents with team members but retaining accountability over document modifications.

See the **Document Notifications** below for more information about new email template notifications associated with this feature.

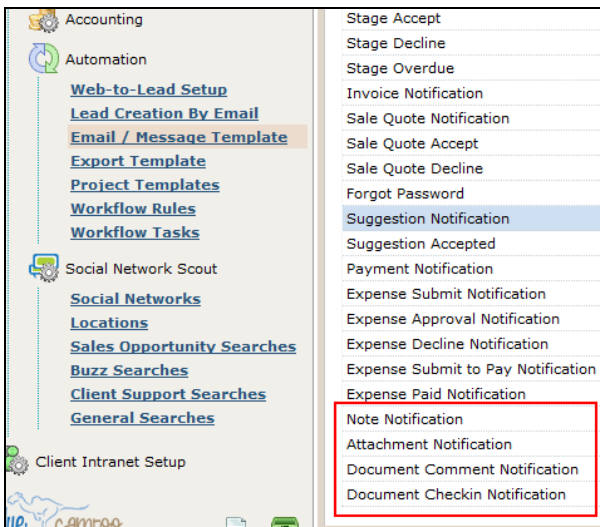
## Notes and Notifications

Various records have different comment boxes. For example, when you close a task (or add any kind of progress) you're prompted to leave a comment. When you complete a call you're prompted to leave a comment. These comments were not well centralized. In this release we're pulling together these comments and displaying them under the **Notes** page (click the **Notes** button  on the left toolbar to access).



To file a comment under **Notes**, when you close (or add Progress to) a task, or log a call, there is now a **Display In Note** checkbox under the **Comment** field. If you check this box, your comment will appear as a note. Note text is displayed in full when you click the **Notes** button on the left toolbar. By having close comments left as notes, you can quickly scan the Notes page for any important information left upon task closing.

## Notification Templates



We've added four new templates to the **Email / Message Template** page. Access this page under **Setup > System Setup > Company Setup > Automation**. You will find the following email templates:

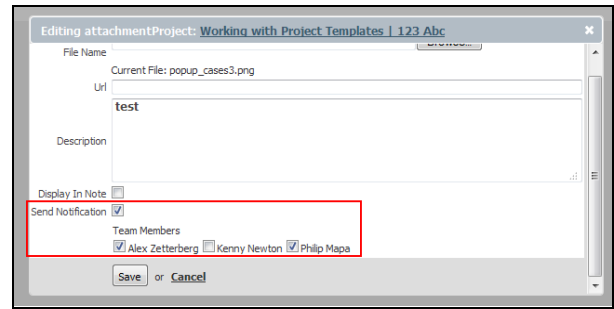
### Document Notifications

Two new templates have been added to provide important notifications when updating and commenting the **Documents**.

**Document Comment Notification:** If a comment is added to a **Document Details** page, this notification will be used to alert the selected team members.

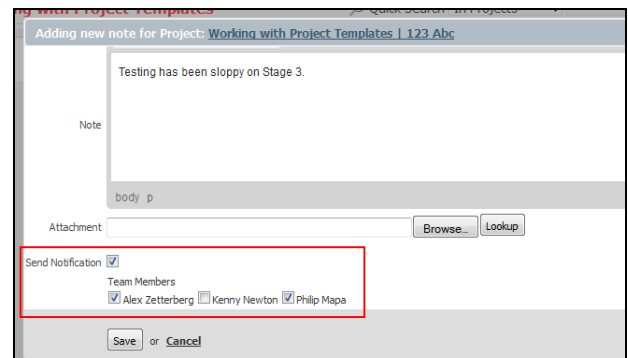
**Document Checkin Notification:** When a document is checked in, this notification will be used to alert the selected team members.

## Attachment Notification



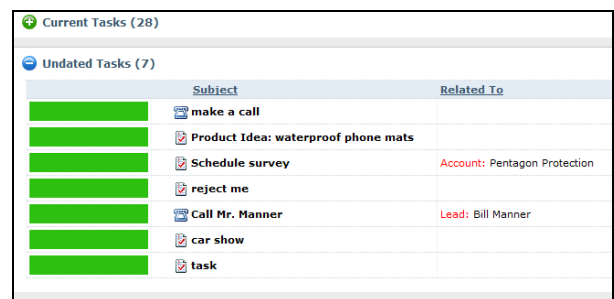
A **Notifications** checkbox has been added to the attachment **Add New** and **Edit** dialog boxes. When checked, you will be given a list of who you want the Attachment Notification to be sent to. The **Attachment Notification** template defines how the email appears.

## Note Notification



We've also added a **Notification** checkbox to a **Notes** details page. It works similar to **Attachments**. When checked, you will be given a list of who you want the **Notes** notification to be sent to. **Note Notification** template defines how the email appears.

## Undated Tasks

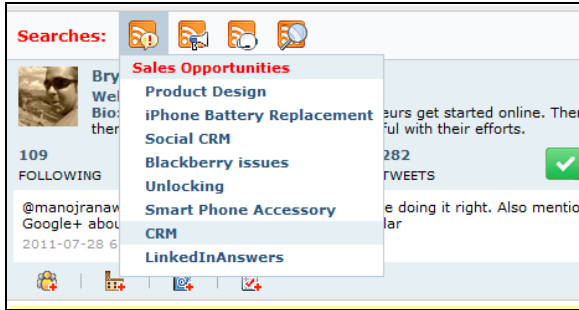


Most tasks have due dates. However, it's not mandatory to give a task a due date. There are certain benefits to creating undated tasks. One can use undated tasks as To Dos on steroids. They can be used as general task you need to get to "some time" but with the additional benefits of tracking progress, time tracking, and the ability to assign them to other users or user groups.

To make this more manageable, the **Home** tab now has an Undated Tasks section that brings these undated tasks to the fore and keeps them organized together.

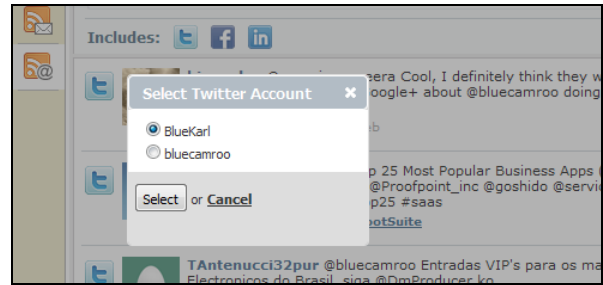
## Social Network Scout


### Channel Search Modifications



The evolution of the Channel Search interface continues in this release. We've replaced the tabs with icons. Hover over an icon and you'll get a drop-down menu of your configured channel searches.

## Mentions



We've added a new button to Social Network Scout's left toolbar. The new **Mentions** button will display any re-tweet or tweet @ featuring your Twitter ID or your company's Twitter ID. 

### Want to Learn More?

If you want to learn more about BlueCamroo, current changes, or engage in dialog with your fellow users, visit BlueCamroo Community page:

<http://www.bluecamroo.com/bluecamroo-community>

Check out our message board forums:

<http://www.bluecamroo.com/forum/category>

Read and comment on our blog:

<http://www.bluecamroo.com/blog>

Also visit our Help & Support page for tips, FAQs, and additional documentation:

<http://www.bluecamroo.com/bluecamroo-help-and-support>