



# BLUE CHAMELEON (Full Documentation)



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# Contents

<b>0</b>	<b>Blue Chameleon Setup Guide</b>	<b>35</b>
<b>1</b>	<b>General Interface Handling</b>	<b>39</b>
1.1	Writing conventions and main menu basics . . . . .	40
1.2	User Menu management . . . . .	41
1.2.1	Adding links . . . . .	41
1.2.2	Adding URLs . . . . .	41
1.2.3	Link management . . . . .	42
1.2.4	Adding menus . . . . .	43
1.3	Event Controls . . . . .	44
1.3.1	Setting up Event Controls . . . . .	44
1.3.2	Managing Event Controls . . . . .	44
1.3.2.1	Displacing . . . . .	45
1.3.2.2	Minimizing / Maximizing . . . . .	45
1.3.2.3	Closing . . . . .	45
1.3.2.4	Full-desktop display . . . . .	45
1.3.2.5	Event Control menu options . . . . .	45
<b>2</b>	<b>Client Management</b>	<b>47</b>
2.1	Adding a new client . . . . .	47
2.1.1	Types of persons/clients . . . . .	48
2.1.2	Client attributes . . . . .	48
2.1.2.1	Making some client data optional or mandatory . . . . .	49
2.2	Client search and update . . . . .	50
2.2.1	Running client searches . . . . .	51
2.2.2	Exporting client data . . . . .	52
2.2.3	Modifying client data . . . . .	52
2.2.4	Transferring to another client . . . . .	52
2.3	The <i>Client Management Page</i> . . . . .	53
2.4	Client lists . . . . .	56
2.4.1	Adding a new client list . . . . .	57
2.5	Marketing campaigns . . . . .	57
2.5.1	Configuring marketing campaigns . . . . .	57
2.5.1.1	Managing advertisements . . . . .	58
2.5.1.2	Client classifications . . . . .	58
2.5.1.3	Advertisement spaces . . . . .	59

2.5.2	Use of client classifications . . . . .	59
2.5.2.1	Changing client classification . . . . .	59
2.5.2.2	Initializing clients without a classification . . . . .	59
2.5.2.3	Resetting client classifications . . . . .	60
<b>3</b>	<b>Article Management</b>	<b>61</b>
3.1	Basic article management . . . . .	61
3.1.1	Building your article database . . . . .	61
3.1.2	Article types and categories . . . . .	64
3.1.2.1	Adding a new article type . . . . .	64
3.1.2.2	Adding a new category . . . . .	65
3.2	Articles, categories and types management through time . . . . .	66
3.2.1	Managing articles . . . . .	66
3.2.1.1	Modifying articles . . . . .	67
3.2.1.2	Article description . . . . .	67
3.2.1.3	Special prices . . . . .	67
3.2.1.4	Article links . . . . .	67
3.2.1.5	Article files . . . . .	68
3.2.1.5.1	Adding an article file . . . . .	68
3.2.1.5.2	Opening article files . . . . .	69
3.2.1.6	Looking for articles . . . . .	69
3.2.1.7	Parent and child articles . . . . .	70
3.2.2	Managing categories and types . . . . .	70
3.2.2.1	Modifying categories and types . . . . .	70
3.3	Options for articles, article types and categories . . . . .	71
3.3.1	Options for articles . . . . .	71
3.3.1.1	Article statuses . . . . .	71
3.3.1.1.1	Sale status . . . . .	71
3.3.1.2	Article usage . . . . .	72
3.3.1.3	Ordering options for articles . . . . .	72
3.3.1.4	Stock options for articles . . . . .	73
3.3.1.5	Invoicing options for articles . . . . .	73
3.3.2	General accounting options for articles . . . . .	73
3.3.3	Options for article types . . . . .	73
3.3.3.1	Article type visibility . . . . .	74
3.3.3.2	Stock support options for article types . . . . .	74
3.3.4	Options for categories . . . . .	74
3.3.4.1	Creating subcategories and more . . . . .	74
3.3.4.2	Ordering options for categories . . . . .	75
3.3.4.2.1	Article ordering level . . . . .	75
3.3.4.2.2	Cart options . . . . .	76
3.3.4.2.3	Ordering quantities . . . . .	76
3.3.4.3	Stock support options for categories . . . . .	77
3.3.4.4	Invoicing options for categories . . . . .	77
3.3.4.5	Display options for categories' related articles . . . . .	77
3.3.4.5.1	Article presentation . . . . .	77

	3.3.4.5.2	Article order . . . . .	78
	3.3.4.6	Method set options for categories . . . . .	78
3.4		Article bundles . . . . .	79
3.5		Further into article configuration . . . . .	80
	3.5.1	Indexes . . . . .	80
	3.5.2	Keys . . . . .	80
	3.5.2.1	Search keys . . . . .	81
	3.5.2.2	Detail keys . . . . .	81
	3.5.2.3	Variable detail keys . . . . .	81
3.6		Stock management . . . . .	82
	3.6.1	Basic creating of stock database . . . . .	82
	3.6.1.1	Creating stock locations . . . . .	82
	3.6.1.2	Creating and managing suppliers . . . . .	83
	3.6.1.3	Creating and managing stock categories . . . . .	83
	3.6.1.4	Creating and managing stock articles . . . . .	85
	3.6.2	Stock article depreciation . . . . .	87
	3.6.3	Stock entries . . . . .	87
	3.6.3.1	With a supplier document . . . . .	87
	3.6.3.2	Without a supplier document . . . . .	88
	3.6.3.3	Managing supplier documents . . . . .	89
	3.6.3.3.1	Updating a supplier document . . . . .	90
	3.6.3.3.2	Closing/reopening a supplier document . . . . .	91
	3.6.4	Delivery : the supplying of items for an order . . . . .	93
	3.6.5	Managing stock items . . . . .	93
	3.6.5.1	Stock summary . . . . .	94
	3.6.5.1.1	External accounts associated with stock statuses . . . . .	94
	3.6.5.2	Searching in stock . . . . .	95
	3.6.5.2.1	Performing stock operations from the <i>Consult</i> <i>Stock Page</i> . . . . .	97
	3.6.5.3	The <i>Stock Details Page</i> . . . . .	97
	3.6.5.4	Stock inventory . . . . .	98
	3.6.5.5	Modifying stock items . . . . .	99
	3.6.5.6	Stock article statuses . . . . .	100
	3.6.5.7	Stock operations . . . . .	100
	3.6.5.8	Getting an item out of stock . . . . .	101
	3.6.5.9	Returning stock items back into stock . . . . .	102
	3.6.5.10	Reparation of a stock item . . . . .	104
	3.6.5.11	Verifying a returned stock item . . . . .	104
	3.6.5.12	Definitely discarding an item . . . . .	105
	3.6.5.13	Transfers . . . . .	105
	3.6.5.14	Exchanges . . . . .	106
	3.6.5.15	Value of a stock item . . . . .	106
3.6.6		Stock documents . . . . .	107
	3.6.6.1	Creating a stock document . . . . .	107
	3.6.6.2	Generally managing stock documents . . . . .	107
	3.6.6.3	Adding items to a stock document . . . . .	108

3.6.6.4	Viewing, printing, closing stock document . . . . .	108
3.7	The 'Subscription' system . . . . .	111
3.7.1	Subscription basics . . . . .	111
3.7.1.1	Creating a subscription . . . . .	111
3.7.1.2	Editing a subscription . . . . .	112
3.7.1.3	Searching for subscriptions . . . . .	112
3.7.1.4	Starting a subscription . . . . .	114
3.7.1.4.1	Starting a subscription on the current day . . . . .	114
3.7.1.4.2	Starting a subscription on another day . . . . .	115
3.7.1.5	Subscription statuses and operations . . . . .	115
3.7.1.5.1	Blocking access to a subscription . . . . .	115
3.7.1.5.2	Suspending a subscription . . . . .	116
3.7.1.5.3	Finishing a subscription prematurely . . . . .	117
3.7.1.5.4	Reactivate a subscription . . . . .	118
3.7.1.5.5	Resetting a subscription . . . . .	118
3.7.2	Monthly invoices . . . . .	119
3.7.2.1	Generating monthly invoices . . . . .	120
3.7.2.2	Validating monthly invoices . . . . .	120
3.7.2.3	Monthly invoice history . . . . .	121
3.7.3	Subscription lists . . . . .	121
3.7.3.1	Creating a subscription list . . . . .	121
3.7.3.2	Processing a subscription list . . . . .	123
3.7.3.3	Filling a subscription list . . . . .	123
3.7.3.4	Featured subscription lists . . . . .	123
3.7.4	Handling of subscriptions with consumptions . . . . .	124
3.7.4.1	Adding a new consumption type . . . . .	126
3.7.4.2	Managing existing consumption types . . . . .	126
3.7.4.3	Subscription statistics . . . . .	126
<b>4</b>	<b>Order Management</b>	<b>127</b>
4.1	Making an order . . . . .	127
4.1.1	Choosing articles and filling-up the shopping cart . . . . .	127
4.1.2	The <i>Make Order Page</i> . . . . .	129
4.1.3	Gift wrapping . . . . .	131
4.1.4	Adding an order attribute . . . . .	132
4.1.5	Order statuses . . . . .	132
4.1.6	The order number . . . . .	133
4.2	Searching orders . . . . .	133
4.3	The <i>Order Details Page</i> . . . . .	134
4.4	Order follow-up . . . . .	135
4.4.1	Modifying an order . . . . .	135
4.4.2	Canceling an order . . . . .	135
4.4.3	Supplying items . . . . .	137
4.5	Article delivery management . . . . .	138
4.5.1	Managing article delivery methods . . . . .	138
4.5.1.1	Delivery costs . . . . .	139

4.5.2	Creating and modifying delivery methods sets . . . . .	141
4.6	Using the cash register . . . . .	142
4.6.1	Selecting an article . . . . .	142
4.6.2	Selecting a client . . . . .	145
4.6.3	Concluding the sale . . . . .	145
4.6.4	Returning an item . . . . .	147
4.7	Sales Statistics . . . . .	149
<b>5</b>	<b>Invoices and Payments Management</b>	<b>153</b>
5.1	Basic invoice handling . . . . .	153
5.1.1	Invoicing an order . . . . .	154
5.1.2	Invoice number . . . . .	155
5.1.3	Invoice statuses . . . . .	155
5.2	Searching invoices . . . . .	156
5.3	The <i>View Invoice Page</i> . . . . .	157
5.4	Invoice management through time . . . . .	158
5.4.1	Operations on invoices . . . . .	158
5.4.2	Orders that have not been invoiced yet . . . . .	159
5.4.3	Invoices for which no payment has been registered yet . . . . .	160
5.4.4	Delivering invoices and reminders . . . . .	160
5.4.5	Invoice addons . . . . .	160
5.4.5.1	Creating an invoice add-on . . . . .	160
5.4.5.2	Managing invoice addons . . . . .	160
5.4.5.2.1	Validating an invoice add-on . . . . .	161
5.4.5.2.2	Canceling an invoice add-on validation . . . . .	162
5.4.5.2.3	Invoice add-on details . . . . .	162
5.5	Printing, sending invoices and reminders . . . . .	162
5.5.1	Quick start : using default print model . . . . .	163
5.5.2	Work sets . . . . .	163
5.5.2.1	Adding and managing work sets . . . . .	166
5.5.3	Sending reminders . . . . .	167
5.5.4	Processing a 'reminder' work set . . . . .	167
5.5.5	Sending a reminder work set . . . . .	168
5.5.6	Other sets that can be created and processed . . . . .	170
5.5.7	Print scripts management . . . . .	171
5.5.8	Print models . . . . .	171
5.5.8.1	Defining your own print models . . . . .	172
5.6	Client payments . . . . .	172
5.6.1	Payment statuses . . . . .	172
5.6.2	Registering invoice payment . . . . .	173
5.6.3	Registering a shop sale payment . . . . .	174
5.6.3.1	Via cash . . . . .	174
5.6.3.2	Via credit card . . . . .	175
5.6.3.3	Balance of a cash register . . . . .	175
5.6.3.4	Operations on balance . . . . .	175
5.6.4	Payment numbers . . . . .	176

5.6.5	Viewing payments . . . . .	176
5.6.6	Credit control . . . . .	177
	5.6.6.1 Credit control classes . . . . .	177
	5.6.6.2 Outstanding amounts . . . . .	179
5.6.7	Checking client accounts . . . . .	180
5.6.8	Checking client balances . . . . .	182
5.6.9	Checking open invoice balances . . . . .	183
5.6.10	Cost analysis . . . . .	184
5.6.11	Internal authorization . . . . .	184
5.7	Credit notes . . . . .	184
	5.7.1 Manually registering a credit note . . . . .	185
	5.7.2 Automatically registering a credit note . . . . .	185
5.8	Reconciling payments . . . . .	186
	5.8.1 Registering a bulk payment . . . . .	187
	5.8.1.1 Registering a payment aimed at no particular invoice . . . . .	187
	5.8.2 Reconciliation process . . . . .	188
	5.8.3 Canceling an already-paid invoice . . . . .	190
5.9	Reminders and payment requests . . . . .	192
	5.9.1 Billing statuses . . . . .	192
	5.9.2 Reminding invoices . . . . .	193
	5.9.3 Looking for and displaying reminded invoices . . . . .	193
	5.9.4 Configuring reminders . . . . .	194
	5.9.5 Managing payment requests . . . . .	195
	5.9.5.1 Payment request statuses . . . . .	196
	5.9.5.2 Payment request search results . . . . .	196
5.10	Domiciliation management . . . . .	196
	5.10.1 Creating default Client domiciliation order . . . . .	197
	5.10.2 Viewing default Client domiciliation order . . . . .	197
	5.10.3 Creating Client domiciliation orders . . . . .	198
	5.10.4 Payment orders . . . . .	198
	5.10.5 Viewing domiciliations . . . . .	199
	5.10.5.1 The 'Billboard' event control . . . . .	200
	5.10.6 Domiciliation batches handling . . . . .	201
	5.10.6.1 Filling a domiciliation batch . . . . .	201
	5.10.7 Domiciliation returns . . . . .	201
<b>6</b>	<b>General Accounting</b>	<b>203</b>
6.1	Working with external accounting system . . . . .	203
	6.1.1 External accounts management . . . . .	204
	6.1.2 Manually exporting data : through a file and/or the External System . . . . .	206
	6.1.2.1 Export problem report . . . . .	207
	6.1.2.2 Manually exporting missing commissions . . . . .	208
	6.1.3 Automatically exporting data . . . . .	208
	6.1.4 Stock export . . . . .	209
	6.1.5 Validating data . . . . .	209
	6.1.6 Exporting to flat file . . . . .	209



6.2	Merchant bank accounts . . . . .	211
6.2.1	Bank accounts . . . . .	211
6.2.2	Credit note accounts . . . . .	212
6.2.3	Cash-box accounts . . . . .	212
6.3	Tax settings . . . . .	213
6.3.1	Tax categories . . . . .	213
6.3.2	Tax codes . . . . .	214
6.4	Payment methods . . . . .	215
6.4.1	Defining and managing payment methods . . . . .	215
6.4.1.1	Payment methods and supported article delivery methods	216
6.4.2	Payment method sets . . . . .	216
6.5	The Online General Accounting tool (OGA) . . . . .	218
6.5.1	Rights related to OGA . . . . .	218
6.5.1.1	Setting OGA access to users . . . . .	218
6.5.1.2	Setting a user's rights on accounts . . . . .	220
6.5.2	First time using OGA . . . . .	221
6.5.2.1	Opening the accounts . . . . .	221
6.5.2.2	Creating the journal for the current year . . . . .	222
6.5.3	OGA Accounts . . . . .	222
6.5.3.1	Adding of accounts . . . . .	222
6.5.3.1.1	OGA accounts and accounts used in Blue Chameleon context . . . . .	223
6.5.3.2	Properties of accounts . . . . .	223
6.5.3.2.1	Special accounts . . . . .	223
6.5.3.3	Modifying account's properties . . . . .	224
6.5.3.4	Looking for accounts . . . . .	224
6.5.3.4.1	Search by number and/or label . . . . .	224
6.5.3.4.2	Search by number range . . . . .	224
6.5.3.5	Managing accounts . . . . .	225
6.5.3.6	Postings on a specific account . . . . .	226
6.5.3.7	Looking for balances . . . . .	228
6.5.4	Journals . . . . .	229
6.5.4.1	Opening balance and closing balance journals . . . . .	229
6.5.4.2	The 'Shop to general accounting' journal (JSTA) . . . . .	230
6.5.5	Time matters . . . . .	230
6.5.5.1	Re-evaluating results . . . . .	230
6.5.5.2	Opening balance . . . . .	231
6.5.5.3	Changing current year . . . . .	231
6.5.5.4	Closing current period . . . . .	231
6.5.5.5	Closing current year . . . . .	232
6.5.5.6	Opening a new year . . . . .	232
6.5.6	Postings . . . . .	232
6.5.6.1	VATs . . . . .	232
6.5.6.2	Adding a transaction . . . . .	233
6.5.6.3	Adding a mail document to a transaction . . . . .	235
6.5.6.4	Accounting documents to be treated . . . . .	235

6.5.6.5	Interim postings . . . . .	236
6.5.6.6	Looking for postings . . . . .	237
6.5.6.7	Achieving reconciliations for an account . . . . .	238
6.5.7	The General Ledger . . . . .	239
6.5.8	Summary sheets . . . . .	239
6.5.8.1	Types of summary sheets . . . . .	239
6.5.8.2	Contents of summary sheets . . . . .	241
6.5.8.2.1	Adding a new element . . . . .	242
6.5.8.2.2	Modifying an element . . . . .	243
6.5.8.2.3	Adding a sub-total . . . . .	243
6.5.8.3	Displaying summary sheets . . . . .	243
6.5.9	Predefined Chart of Accounts (COA) . . . . .	245
<b>7</b>	<b>General Tools</b>	<b>249</b>
7.1	News . . . . .	249
7.1.1	The rights to access news and to publish news to user groups . . . . .	249
7.1.2	Creating news . . . . .	250
7.1.3	Publishing news . . . . .	251
7.1.4	Reading news . . . . .	251
7.2	Agenda . . . . .	252
7.2.1	Agenda setup guide . . . . .	252
7.2.2	Agenda administration . . . . .	252
7.2.2.1	Defining RV types . . . . .	252
7.2.2.2	Color management . . . . .	254
7.2.2.3	Defining agendas for users or user groups . . . . .	255
7.2.2.3.1	Editing agenda style . . . . .	255
7.2.2.3.2	Assessing RV types to agenda . . . . .	256
7.2.2.3.3	Groups of agendas . . . . .	256
7.2.2.4	Access rights for users groups . . . . .	257
7.2.2.5	Default agenda per user . . . . .	257
7.2.3	Agenda use . . . . .	258
7.2.3.1	Adding an appointment . . . . .	259
7.2.3.1.1	Appointments for other objects - or none . . . . .	260
7.2.3.2	Modifying an appointment . . . . .	261
7.2.3.3	Moving or deleting an appointment . . . . .	262
7.2.3.4	Flexible appointments . . . . .	263
7.2.3.5	Reminding appointments . . . . .	264
7.2.3.6	Closure of appointments and insertion in Timesheets . . . . .	264
7.3	Alarms . . . . .	265
7.3.1	Setting an alarm . . . . .	265
7.3.2	Modifying an alarm, turning it off . . . . .	266
7.3.3	The Alarm Event Control . . . . .	266
7.3.4	Alarms for other objects . . . . .	266
7.4	File manager . . . . .	267
7.4.1	Basic File Manager use . . . . .	268
7.4.1.1	Folder and file managing . . . . .	268

7.4.2	File and folder rights . . . . .	269
7.5	Lists of Tasks . . . . .	270
7.5.1	Rights for Lists of Tasks . . . . .	271
7.5.2	Task list models and task types . . . . .	271
7.5.2.1	Modifying a task list model . . . . .	272
7.5.2.2	Access rights of a task list model . . . . .	273
7.5.2.3	Adding task types to task list models . . . . .	274
7.5.3	The use of task lists . . . . .	274
7.5.3.1	Opening a task list . . . . .	275
7.5.3.2	Searching for task lists . . . . .	276
7.5.3.3	The 'View : Tasks' display . . . . .	276
7.5.3.4	Recording tasks . . . . .	277
7.5.3.4.1	Updating tasks . . . . .	278
7.5.4	Printing out task lists . . . . .	278
7.5.5	Management of Task lists through time . . . . .	279
7.5.5.1	Re-opening a task . . . . .	280
7.6	Object properties . . . . .	281
7.6.1	Rights for Properties . . . . .	281
7.6.2	Creating properties and managing them . . . . .	282
7.6.2.1	Modifying properties . . . . .	283
7.6.2.1.1	Date, Time properties . . . . .	284
7.6.2.1.2	'Ref. object' properties . . . . .	284
7.6.3	Setting properties . . . . .	285
7.6.3.1	Updating, removing a property . . . . .	286
7.6.3.2	Adding other properties . . . . .	287
7.6.4	List of objects to set properties for . . . . .	287
7.7	Paperwork management . . . . .	289
7.7.1	The <i>Mail Management Page</i> . . . . .	289
7.7.2	Access levels . . . . .	290
7.7.3	Creating a mail document . . . . .	290
7.7.3.1	Viewing/managing a mail document . . . . .	292
7.7.3.2	Mail document tickets . . . . .	293
7.7.3.3	Attaching mail documents . . . . .	293
7.7.4	Attach current mail document to an other . . . . .	294
7.7.5	Viewing attachments/attached document . . . . .	295
7.7.6	Flagging mail documents as treated and archived . . . . .	296
7.7.7	Mail document types . . . . .	297
7.8	Wall . . . . .	297
7.9	Customer Relationship Manager (CRM) . . . . .	298
7.9.1	Rights related to Customer Relationship Manager . . . . .	298
7.9.2	CRM's Main Page . . . . .	299
7.9.3	Contact managing . . . . .	300
7.9.3.1	Adding a prospect . . . . .	300
7.9.3.2	Uploading a list of prospects . . . . .	300
7.9.3.3	Upgrading a prospect . . . . .	300
7.9.3.4	Searching for contacts . . . . .	300

7.9.3.5	Creating contact lists . . . . .	302
7.9.3.5.1	Creating/expanding a contact list via an upload	303
7.9.3.6	Salesperson in charge of a contact . . . . .	304
7.9.4	Actions . . . . .	306
7.9.4.1	Taking an action on a contact . . . . .	306
7.9.4.1.1	Types of actions . . . . .	306
7.9.4.2	Managing past and future actions . . . . .	307
7.9.4.2.1	The Action calendar : scheduling actions . . . . .	307
7.9.4.2.2	Editing actions : examples . . . . .	308
7.9.5	'Information' actions . . . . .	309
7.9.6	Looking for actions . . . . .	309
7.9.6.1	List of actions for a contact . . . . .	310
7.9.7	Postal campaigns . . . . .	312
7.9.7.1	Adding a new postal campaign . . . . .	312
7.9.7.2	Adding a contact list to a postal campaign . . . . .	313
7.9.7.3	Adding a document to a postal campaign . . . . .	314
7.9.7.4	Marking a postal campaign as 'sent' . . . . .	314
7.9.7.5	Duplicating a sent postal campaign . . . . .	315
7.9.7.6	Canceling an unsent postal campaign . . . . .	315
7.9.8	Electronic campaigns . . . . .	315
7.9.8.1	Creating an electronic campaign . . . . .	316
7.9.8.2	Sending an electronic campaign . . . . .	318
7.9.8.3	Duplicating or canceling an electronic campaign . . . . .	319
7.9.8.4	Attaching a file to an electronic campaign . . . . .	319
7.9.9	Postal/electronic letters . . . . .	319
7.9.10	Predefined forms . . . . .	320
7.9.10.1	Writing predefined form models . . . . .	321
7.9.10.2	Generating a form . . . . .	322
7.9.11	Action statistics . . . . .	324
7.9.11.1	Action statistics, on a specific contact list . . . . .	325
7.10	Projects/Timesheets . . . . .	327
7.10.1	Rights related to Projects/Timesheets . . . . .	327
7.10.2	<i>Projects/Timesheets main page</i> . . . . .	328
7.10.3	Projects . . . . .	329
7.10.3.1	Creating a project . . . . .	329
7.10.3.2	Managing a project . . . . .	330
7.10.3.3	Modifying a project . . . . .	331
7.10.3.4	Project actions . . . . .	332
7.10.3.5	Allowed services for a project . . . . .	332
7.10.4	Project's tasks . . . . .	334
7.10.4.1	Managing tasks . . . . .	334
7.10.4.2	List of tasks . . . . .	335
7.10.5	Project event control . . . . .	335
7.10.6	Project planning . . . . .	336
7.10.7	Projects/Timesheets administration . . . . .	338
7.10.7.1	Teams of users . . . . .	338

7.10.8	Managing Timesheets . . . . .	338
7.10.8.1	Creating timesheets . . . . .	340
7.10.8.2	Creating a service timesheet . . . . .	340
7.10.8.2.1	Creating a service timesheet for a team . . . . .	342
7.10.8.3	Creating an article timesheet . . . . .	342
7.10.8.4	Modifying timesheets . . . . .	343
7.10.8.5	Printing and exporting timesheets . . . . .	343
7.10.9	Invoicing timesheets . . . . .	346
7.10.9.1	Pre-invoicing . . . . .	347
7.10.9.2	Finally creating the invoice . . . . .	349
7.10.9.3	Details on invoiced timesheets . . . . .	349
7.11	Human Resource Manager (HRM) . . . . .	351
7.11.1	HRM setup guide . . . . .	351
7.11.2	Rights related to the Human Resource Manager . . . . .	351
7.11.3	Planning view . . . . .	353
7.11.3.1	The User Information pop-up . . . . .	355
7.11.3.2	The Manage Day pop-up . . . . .	355
7.11.4	Planning Administration . . . . .	357
7.11.4.1	Defining workweek profiles . . . . .	358
7.11.4.2	Defining workday profiles . . . . .	359
7.11.4.3	The <i>Manage Staff Page</i> . . . . .	359
7.11.4.4	Configuring an employee . . . . .	361
7.11.4.4.1	Configuring workweek profiles . . . . .	363
7.11.4.5	Yearly management . . . . .	364
7.11.4.6	Configuring activities . . . . .	364
7.11.4.6.1	Activity categories . . . . .	364
7.11.4.6.2	Defining activities . . . . .	364
7.11.4.7	Holiday notifications . . . . .	365
7.11.4.8	HRM reports . . . . .	367
7.11.4.9	User teams . . . . .	367
7.11.5	Holiday use . . . . .	370
7.11.5.1	The <i>My Holidays Page</i> . . . . .	370
7.11.5.2	Planning holidays . . . . .	370
7.11.5.3	Viewing holidays . . . . .	372
7.11.5.4	Modifying holidays . . . . .	373
7.11.5.4.1	Adding new days to a holiday request . . . . .	375
7.11.5.4.2	Canceling a holiday request . . . . .	375
7.11.5.5	User's holiday history . . . . .	375
7.11.5.6	The <i>Manage Users' Holidays Page</i> . . . . .	375
7.11.5.6.1	The "Pending request" event control . . . . .	377
7.11.5.7	Accepting/refusing a user's holidays . . . . .	377
7.11.5.8	Pre-evaluating a user's holidays . . . . .	378
7.11.5.9	Managing users' holiday credit and debit . . . . .	378
7.11.6	Overtime management . . . . .	380
7.11.6.1	Modifying overtimes . . . . .	382
7.11.7	Changing a workweek or a workday to another profile . . . . .	382

7.11.8	Work history . . . . .	383
7.11.8.1	Converting overtime . . . . .	383
7.11.9	Sick leaves . . . . .	384
7.11.9.1	Modifying sick leaves . . . . .	385
7.11.9.2	Sick leave history . . . . .	385
7.11.10	Activities . . . . .	386
7.11.10.1	Setting activities for a day . . . . .	386
7.11.10.2	Setting activities for a week or month . . . . .	387
<b>8</b>	<b>Customer Support</b>	<b>389</b>
8.1	Helpdesk setup guide . . . . .	389
8.2	Ticket purposes and basics . . . . .	390
8.2.1	Creating a ticket . . . . .	390
8.2.2	Creating tickets for other objects (In Development) . . . . .	391
8.2.3	Ticket statuses . . . . .	391
8.2.4	Ticket duration . . . . .	392
8.2.5	Ticket priorities . . . . .	393
8.3	Searching for tickets and displaying them . . . . .	393
8.3.1	Different ways to look for tickets . . . . .	393
8.3.2	Styles for displaying tickets . . . . .	394
8.3.3	The <i>View Ticket Page</i> . . . . .	394
8.3.4	Ticket display details - The Advanced Mode . . . . .	395
8.4	Processing a ticket : an example . . . . .	396
8.5	Checking time evolution of ticket-related data . . . . .	400
8.5.1	User activity . . . . .	400
8.5.2	Ticket statistics . . . . .	401
8.5.2.1	'Global Statistics:' . . . . .	401
8.5.2.2	'Statistics for selected parameter:' . . . . .	401
8.5.2.3	'Global Statistics - sort by parameters:' . . . . .	401
<b>9</b>	<b>General Configuration</b>	<b>405</b>
9.1	The <i>Merchant Configuration Page</i> . . . . .	405
9.1.1	Merchant general information . . . . .	405
9.1.2	Merchant addresses . . . . .	406
9.1.3	Client preferences . . . . .	406
9.1.4	Article preferences . . . . .	407
9.1.5	Shop and order preferences . . . . .	410
9.1.6	Invoice and payment preferences . . . . .	411
9.1.7	Miscellaneous preferences . . . . .	412
9.1.8	Currencies . . . . .	413
9.1.9	Countries and languages . . . . .	413
9.2	Creating shops . . . . .	414
9.2.1	Creating a cash register for a shop . . . . .	415
9.3	Creating resellers . . . . .	416
9.4	User groups and users . . . . .	417
9.4.1	Creating user groups . . . . .	417

9.4.2	Users . . . . .	417
9.4.3	List of users and login information . . . . .	417
9.4.3.1	Disabling access to users, closing their account . . . . .	419
9.4.4	Creating users . . . . .	420
9.4.5	Configuring users . . . . .	420
9.5	Service level agreement (SLA) . . . . .	422
9.6	Salesperson management . . . . .	423
9.6.1	General managing of salespersons . . . . .	423
9.6.2	Commissions and commission contracts for salespersons . . . . .	424
9.6.2.1	Commision contracts . . . . .	424
9.7	Illustrating Blue Chameleon elements with your images . . . . .	426
9.7.1	Viewing and managing images . . . . .	426
9.7.2	Adding an article image . . . . .	426
9.8	System task management . . . . .	428
9.8.1	Executed system tasks . . . . .	430
9.8.2	Scheduler tasks . . . . .	430
<b>10</b>	<b>Ticket issuing prerogatives and administration</b>	<b>433</b>
10.1	The <i>Forwards Administration Page</i> . . . . .	434
10.2	The <i>List of Ticket Types Page</i> . . . . .	434
10.2.1	Creating ticket types . . . . .	434
10.2.2	Going further into ticket type configuration . . . . .	436
10.2.2.1	Categories and parameters for a ticket type . . . . .	436
10.2.2.2	Predefined emails . . . . .	437
10.2.2.3	Predefined texts . . . . .	439
10.2.2.4	Predefined durations . . . . .	440
10.3	The <i>List of Ticket Styles Page</i> . . . . .	440
10.3.1	Emphasizing on a certain ticket . . . . .	441
10.4	The <i>User Details Page</i> . . . . .	442
10.4.1	Style for user . . . . .	443
10.4.2	Rights for user . . . . .	444
10.4.3	Ticket types for user . . . . .	444
10.5	The <i>User Groups Page</i> . . . . .	444
10.6	Logical types (In Development) . . . . .	445
10.7	Public (In Development) . . . . .	445
<b>11</b>	<b>Setting user rights</b>	<b>447</b>
11.1	User right basics . . . . .	447
11.1.1	Other kinds of user right values . . . . .	447
11.1.1.1	Article ordering . . . . .	448
11.1.1.2	Privacy access . . . . .	448
11.1.1.3	Commercial access . . . . .	448
11.1.1.4	Financial access . . . . .	448
11.2	Viewing and modifying user rights . . . . .	448
11.3	List of user rights . . . . .	449
11.3.1	General <i>user rights</i> . . . . .	450

11.3.2	<i>Menu script user rights</i> . . . . .	450
11.3.3	Rights pertaining to add-ons . . . . .	450
<b>12</b>	<b>Main Menu personalization</b>	<b>451</b>
12.1	Command group names . . . . .	452
12.2	Command group displacement . . . . .	452
12.3	Displaying sub-(...)-menus and procedures . . . . .	452
<b>13</b>	<b>The Document Editor</b>	<b>455</b>
13.1	General use . . . . .	455
13.1.1	Edition : undo, copy, paste... . . . . .	455
13.1.2	Text . . . . .	456
13.1.2.1	Highlighting text . . . . .	456
13.1.2.2	Font and font size . . . . .	456
13.1.2.3	Font style . . . . .	457
13.1.2.4	Font color . . . . .	457
13.1.2.5	Alignment and indentation . . . . .	458
13.1.2.6	Special characters . . . . .	458
13.1.2.7	Miscellaneous . . . . .	458
13.1.2.8	HTML code and comments . . . . .	458
13.1.2.9	Hyperlinks . . . . .	458
13.1.3	Lists . . . . .	459
13.1.4	Tables . . . . .	459
13.1.4.1	Selecting a whole table vs. selecting cells . . . . .	460
13.1.4.2	Table properties . . . . .	461
13.1.4.3	Cell properties . . . . .	462
13.1.4.3.1	Merging cells . . . . .	462
13.1.4.3.2	Removing the borders of cells . . . . .	463
13.1.4.3.3	Cell coloring . . . . .	463
13.1.4.4	Borders . . . . .	464
13.1.4.5	Adding columns and rows . . . . .	466
13.1.4.6	Removing columns and rows . . . . .	468
13.1.5	Document images . . . . .	468
13.1.5.1	Uploading images . . . . .	468
13.1.5.2	Inserting document images . . . . .	468
13.1.5.3	Document image properties . . . . .	468
13.1.6	Client-related information - and other information . . . . .	469
13.2	Mailings and campaigns templates . . . . .	470
13.2.1	Creating a template . . . . .	471
13.2.2	Example . . . . .	472
13.2.2.1	Header . . . . .	472
13.2.2.2	Footer . . . . .	472
13.2.2.3	Result . . . . .	473
13.3	Model document management . . . . .	474
13.3.1	Creating a model document . . . . .	474
13.3.2	Selecting a model document . . . . .	475



<b>14 Frequently Asked Questions</b>	<b>477</b>
14.1 Questions	477
14.1.1 On Blue Chameleon general interface	477
14.1.2 On Client Management	477
14.1.3 On Article Management	477
14.1.3.1 On article creation/modifying	477
14.1.3.2 On category creation/modifying	478
14.1.3.3 On stock management	478
14.1.3.4 On stock subscription management	478
14.1.4 On Order Management	479
14.1.5 On Invoice and Payments Management	479
14.1.5.1 On invoice basic management	479
14.1.5.2 On reminding invoices	479
14.1.5.3 On work sets	480
14.1.5.4 On client payments	480
14.1.6 On General Accounting, including OGA	480
14.1.6.1 On bank accounts and payment methods	480
14.1.6.2 On exporting to External System	480
14.1.6.3 OGA	480
14.1.7 On General Tools, including OTS and CRM	480
14.1.7.1 On News	480
14.1.7.2 On Agenda	480
14.1.7.3 On File Manager	481
14.1.7.4 On Customer Relationship Management	481
14.1.8 Customer Support	481
14.1.9 General Configuration	481
14.1.9.1 On Blue Chameleon appearance	481
14.1.9.2 On Merchant/shops/salespersons...	482
14.1.10 Advanced Functions and Configuring	482
14.1.10.1 Ticket issuing prerogatives and administration	482
14.1.10.2 Setting user rights	482
14.1.10.3 On Main Menu personalization	482
14.1.10.4 On the Document Editor	482
14.2 Answers	482
14.2.1 Blue Chameleon's general interface	482
14.2.2 Client Management	482
14.2.3 Article Management	484
14.2.3.1 On article creation/modifying	484
14.2.3.2 On category creation/modifying	484
14.2.3.3 On stock management	486
14.2.3.4 On stock subscription management	487
14.2.4 Order Management	488
14.2.5 Invoice and Payments Management	490
14.2.5.1 On invoice basic management	490
14.2.5.2 On reminding invoices	492
14.2.5.3 On work sets	492

14.2.5.4	On client payments . . . . .	493
14.2.6	General Accounting . . . . .	493
14.2.6.1	On bank accounts and payment methods . . . . .	493
14.2.6.2	On exporting to External System . . . . .	494
14.2.6.3	On OGA . . . . .	494
14.2.7	General Tools . . . . .	495
14.2.7.1	On News . . . . .	495
14.2.7.2	On Agenda . . . . .	495
14.2.7.3	On File Manager . . . . .	496
14.2.7.4	On Customer Relationship Management . . . . .	496
14.2.8	Customer Support . . . . .	498
14.2.9	General Configuration . . . . .	499
14.2.9.1	On Blue Chameleon general appearance . . . . .	499
14.2.9.2	On Merchant/shops/salespersons... . . . .	499
14.2.10	Advanced Functions and Configuring . . . . .	500
14.2.10.1	Ticket issuing prerogatives and administration . . . . .	500
14.2.10.2	Setting user rights . . . . .	500
14.2.10.3	Main Menu personalization . . . . .	501
14.2.10.4	The Document Editor . . . . .	501
<b>15</b>	<b>An Electronic Newsletter</b>	<b>503</b>
15.1	Introducing the case . . . . .	503
15.2	Building the newsletter . . . . .	504
15.2.1	Handling contact lists . . . . .	505
15.2.1.1	Importing contacts . . . . .	506
15.2.2	Filling in the email header . . . . .	507
15.2.3	Composing the newsletter . . . . .	507
15.3	Sending it ! . . . . .	508
15.4	Managing it through time . . . . .	508
15.5	Tips . . . . .	510
15.5.1	Images for electronic campaigns . . . . .	510
15.5.2	Using templates . . . . .	510
15.5.2.1	Creating a "Email Templates" folder and creating templates	510
15.5.2.2	Opening templates . . . . .	511

# List of Figures

1.1	Blue Chameleon's screen. . . . .	39
1.2	Easily accessing a page. . . . .	40
1.3	Adding the menu element 'Articles' to the User Menu. . . . .	42
1.4	Clicking on one element of the User Menu displays the corresponding page. . . . .	42
1.5	The creation of a User Menu menu called 'Article Stuff'. . . . .	43
1.6	An example of what can be achieved with User Menu menus. . . . .	44
1.7	Setting the display with 'Helpdesk' and 'News' Event Controls. . . . .	45
1.8	This pop-up enables to fix an Event Control's name and height. . . . .	46
2.1	Adding a new client. . . . .	49
2.2	Adding a new client attribute, phone. . . . .	50
2.3	Making the "phone" attribute mandatory for any client creation. . . . .	50
2.4	The <i>View Clients Page</i> , allowing to run searches. . . . .	51
2.5	Generating an export file for all registered clients (as generated by using % character in the 'Name:' field). . . . .	52
2.6	Transferring a client's data to an other, and keeping original client account. . . . .	53
2.7	The <i>Client Management Page</i> for client John Smith. . . . .	54
2.8	List(s) featuring a particular client. . . . .	56
2.9	Creating a contact list for gathering "VIP" clients. . . . .	57
2.10	The <i>Marketing Campaign Page</i> . . . . .	57
2.11	Adding the marketing category. . . . .	58
2.12	Adding an advertisement space. . . . .	59
2.13	Putting the clients in a specific client list in a marketing category. . . . .	60
3.1	Adding the new article <i>Cheddar Crackers Box</i> . . . . .	62
3.2	Adding the new article type "Snacks". . . . .	64
3.3	Adding the new category 'Crackers'. . . . .	65
3.4	The <i>Article Management Page</i> for article <i>Cheddar Crackers Box</i> . . . . .	66
3.5	Adding/modifying an article's description. . . . .	67
3.6	Attaching a file to a particular article. . . . .	68
3.7	Getting to a previously-uploaded article file. . . . .	69
3.8	Looking for articles. . . . .	69
3.9	Creating another level of classification. . . . .	75
3.10	Once a category enables stock support, the articles that depend from it provide a menu where they can be associated with a stock article. . . . .	77
3.11	Creating an 'article bundle' : various articles are picked and gathered. . . . .	79
3.12	An article bundle can be checked and edited anytime, content-wise. . . . .	80

3.13	Adding a variable detail key that will be used afterwards to fill in an article's origin while ordering. . . . .	81
3.14	The <i>Stock Management Page</i> , with buttons designed to accomplish any stock-related action. . . . .	82
3.15	Creating and viewing stock locations. . . . .	83
3.16	Adding a supplier. . . . .	84
3.17	The <i>Suppliers Management Page</i> , showing possibility to view a supplier's details as well as managing it. . . . .	84
3.18	( <i>Top</i> :) Creating a new stock category ; ( <i>Bottom</i> :) Creating a new stock subcategory, from an already-defined stock category. . . . .	85
3.19	Displaying current stock categories. . . . .	86
3.20	Creating a new stock article. . . . .	86
3.21	The <i>View Stock Article Page</i> . . . . .	87
3.22	Creating a supplier document. . . . .	88
3.23	The whole process to greet a stock entry for article <i>Cheddar Crackers Box</i> . . . . .	89
3.24	The conclusion screen after having successfully created a new stock entry. . . . .	90
3.25	The whole process to greet a stock entry for article <i>Cheddar Crackers Box</i> , with suppliers 'disabled'. . . . .	90
3.26	This page allows to view and manage supplier documents. . . . .	91
3.27	From here, this supplier document can be updated in any way. It is also possible to check the items that have been entered through it (as precisely pictured in Fig.3.23) and ordered (as they were in Fig.4.9). . . . .	91
3.28	Closing a supplier document. . . . .	92
3.29	Reopening the supplier document as previously closed. . . . .	92
3.30	Using stock items to supply a particular order. . . . .	93
3.31	The <i>Stock Summary Page</i> , a quantity-oriented view on stock. . . . .	95
3.32	Associating a stock status with expenses and depreciation accounts. . . . .	96
3.33	The <i>Search In Stock Page</i> . . . . .	97
3.34	The <i>Stock Details Page</i> for a sold item. . . . .	98
3.35	Inventory of stock items currently present at a specific stock location. . . . .	99
3.36	Changing the serial number of a stock item. . . . .	100
3.37	Taking a stock item out of stock (not irreversibly), from four possible causes. . . . .	102
3.38	Putting back a previously-lost, now-found item into stock. . . . .	103
3.39	Transferring a stock item from one location to another. . . . .	105
3.40	Exchanging the respective locations of two stock items. . . . .	106
3.41	Creating a stock document attached to location 'Main Warehouse'. . . . .	108
3.42	Stock documents that have been created. . . . .	108
3.43	Adding a stock item to a stock document. . . . .	109
3.44	Viewing a stock document. . . . .	109
3.45	The <i>Subscription Management Page</i> , with buttons designed to accomplish any subscription-related action. . . . .	111
3.46	Adding a new subscription article. . . . .	112
3.47	Once a new subscription has just been created, this screen allows to define all of its properties. . . . .	113
3.48	The subscription's main details. . . . .	114
3.49	Updating the price of a subscription article. . . . .	114

3.50	A subscription search, showing two recently ordered subscriptions waiting for activation. . . . .	115
3.51	An advanced subscription search, led on orders done in 2008, on subscription articles 'At-Home Delivery, 1 Month', on client article list containing this subscription and done by salesman Dick. . . . .	116
3.52	The page for a client's subscription, that we choose to start right now. . .	117
3.53	Starting a subscription on another date. . . . .	117
3.54	An 'activated' subscription's page shows a wide variety of possible actions.	118
3.55	Blocking a client's subscription, starting right now. . . . .	118
3.56	Scheduling a subscription block for another day ; the scheduled operation appears in this subscription's page. . . . .	118
3.57	Suspending a subscription right on the moment. . . . .	119
3.58	Prematurely finishing a subscription ; end date now displays. . . . .	119
3.59	Putting blocked and suspended subscriptions back into the green 'activated' status. . . . .	119
3.60	This subscription's premature end date is canceled by resetting. . . . .	120
3.61	The <i>Monthly Invoice Management Page</i> , with buttons designed to accomplish any action related to subscription monthly invoices. . . . .	120
3.62	Generating monthly invoices for June 2008 concerning 'At-Home Delivery, 1-Month' subscriptions. At the end, 4 invoices related to 4 subscriptions have been created. . . . .	121
3.63	The list of temporary invoices just before their final validation. . . . .	122
3.64	The list of monthly invoices that have been generated and the details of the June, 2008 one. . . . .	122
3.65	Creating a new subscription list. . . . .	123
3.66	This <i>Work Set Process Page</i> is specifically designed to accomplish actions on subscription lists. . . . .	123
3.67	Adding finished 'At-Home Delivery, 1 Month' subscriptions to set 'AHD'.	124
3.68	List(s) featuring a particular subscription. . . . .	124
3.69	Creating an subscription article that will handle both a subscription fee (10\$) and a consumption (0.1\$ per minute). . . . .	125
4.1	Preparing an order of 3 <i>Cheddar Crackers Boxes</i> . . . . .	128
4.2	The <i>Shopping Cart Page</i> , showing that 3 <i>Cheddar Crackers Boxes</i> are currently in the shopping cart. . . . .	129
4.3	( <i>Left :</i> ) The <i>Make Order Page</i> , enabling to modify the order's details ; ( <i>Right :</i> ) last screen before final order validation. . . . .	130
4.4	Screen confirming that order has been registered. . . . .	131
4.5	Adding an order attribute that will be an optional field dedicated to leave a small comment. . . . .	132
4.6	An example of order search. . . . .	134
4.7	The <i>Order Details Page</i> . . . . .	135
4.8	The <i>Modify Order Page</i> , with a multitude of choices for modifications. . .	136
4.9	Picking stock items from their location to fulfill the order. . . . .	137
4.10	The <i>Order Details Page</i> , now showing the stock items that have been taken out of stock for this order. . . . .	138

4.11	Adding a delivery method for orders that will be picked directly at a store.	139
4.12	Adding a mail delivery method that always costs 3 per sending.	140
4.13	Adding a mail delivery method whose costs depend on the order's amount.	141
4.14	The cost details for 'VERY Secured mail' article delivery method.	141
4.15	Defining a delivery method set grouping all delivery-by-mail methods.	142
4.16	The <i>Shop Sale Page</i> .	143
4.17	Selecting an article for a shop sale.	144
4.18	Selecting a client for a shop sale.	145
4.19	Concluding the sale by registering payment.	146
4.20	Returning a previously-sold, stock-managed item.	148
4.21	Graph showing an example of order evolution, during one year.	149
4.22	Graph showing an example of turnover evolution, during one year.	150
4.23	Table showing example data of turnover evolution, during one year.	151
4.24	Table showing example data of orders (broken down by order status), during one year.	151
5.1	The <i>Invoice Management Page</i> , with buttons designed to accomplish any invoice-related action.	153
5.2	The <i>Add New Invoice Page</i> allowing to create an invoice for a given order.	155
5.3	The invoice search engine and the results it displays.	156
5.4	The <i>View Invoice Page</i> .	158
5.5	Displaying the uninvoiced orders for August, 2008 and invoicing them.	159
5.6	Creating an invoice add-on to go with a particular subscription.	161
5.7	Validating a new invoice add-on.	161
5.8	This page, displaying the details of an invoice add-on, allows in the case of validated addons to cancel the validation.	162
5.9	An example of an invoice printout that uses the Default print model.	164
5.10	These buttons, as available on the <i>Invoice Management Page</i> , are designed to accomplish any action related to work sets.	165
5.11	Creating a 'Basic invoice copy' work set.	165
5.12	The <i>Work Set Process Page</i> is designed to accomplish actions on a particular work set.	168
5.13	Sending paper mail and email reminders for invoices to be reminded.	169
5.14	The sending of a work set is featured on its <i>Work Set Process Page</i> .	170
5.15	Enriching the 'Default' print template, as used by the 'Default invoice model' print model.	172
5.16	The <i>Client Payment Management Page</i> , with buttons designed to accomplish any client payment-related action.	173
5.17	Registering a payment.	174
5.18	Registering the payment of a shop sale via cash.	175
5.19	Registering the payment of a shop sale via a credit card.	176
5.20	Checking the balance of a cash register as it is after the payments registered via cash (5.6.3.1) and via credit card (5.6.3.2).	177
5.21	Putting change inside a cash register.	178
5.22	An example of payment search.	178
5.23	Defining a default control class.	179

5.24	Scheduling the calculation of outstanding amounts. . . . .	180
5.25	The <i>View Client Account Page</i> . . . . .	181
5.26	Viewing client balances. . . . .	182
5.27	Viewing balances related to open invoices and also exporting them. . . . .	183
5.28	Internally authorizing orders. . . . .	184
5.29	Registering a credit note for a specific invoice. . . . .	185
5.30	Canceling an invoice automatically creates a related credit note. . . . .	186
5.31	A search on open invoices shows that this client still has to pay for three orders. . . . .	187
5.32	A larger payment for that invoice is registered. . . . .	188
5.33	The details of this payment show well that 68 have gone to pay the invoice and that an extra 32 remains. . . . .	189
5.34	Registering a payment related to no invoice (yet). . . . .	189
5.35	Displaying the details on how a payment was used : as overall balance is positive, reconciliation is proposed. . . . .	190
5.36	The 32 as available in the selected payment allows to reconcile the invoice. . . . .	191
5.37	How this payment was used. . . . .	192
5.38	Removing an invoice's payment. . . . .	192
5.39	Choices by which to display open invoices. . . . .	193
5.40	Making choices on clients to whom to send reminders, and for which invoices ; and setting contact options. . . . .	194
5.41	Billing status is updated automatically for reminded clients. . . . .	195
5.42	Displaying the reminders issued on May, 2009. . . . .	195
5.43	The history and contents of a particular reminder. . . . .	195
5.44	A payment request search done on internally authorized orders. . . . .	196
5.45	Creating a 'all-orders' domiciliation order for client Cletus Barnes, on his defined account. . . . .	198
5.46	This page lists all domiciliation orders for a particular client, so far only 'all orders'. . . . .	199
5.47	Creating a domiciliation order, from the 'Sales' environment. . . . .	200
5.48	The example order above is dutifully displayed. . . . .	200
5.49	The <i>View Client Domiciliation Orders</i> : viewing clients for which domiciliation is 'registered'. . . . .	201
6.1	The <i>External System Management Page</i> , with buttons designed to accomplish external accounting-related actions. . . . .	203
6.2	Adding a new external account 40001, which will be used as the specific external account for clients. . . . .	205
6.3	Viewing current external accounts, with a search tool by type. . . . .	205
6.4	Exporting to the External System. . . . .	206
6.5	This report shows what would not be successfully exported and why. . . . .	207
6.6	Exporting to the External System the missing commissions. . . . .	208
6.7	Validating previously exported data. . . . .	210
6.8	Exporting accounting data to a flat file. . . . .	210
6.9	An excerpt of a flat file. . . . .	211
6.10	Adding a new bank account. . . . .	212

6.11	Adding a new credit note account. . . . .	212
6.12	Adding a new cash-box account. . . . .	212
6.13	<i>Tax Code Page</i> , featuring all defined tax codes. . . . .	213
6.14	( <i>Top :</i> ) The <i>Tax Category Page</i> ; ( <i>bottom :</i> ) adding 'Rest of the World' as a zone for which no tax apply. . . . .	214
6.15	Adding a new tax code. . . . .	214
6.16	Adding a payment method where client payments will be transferred on the specified account. . . . .	215
6.17	This payment method will support all pick-up-order delivery methods. . .	216
6.18	Creating a payment method set gathering certain payment methods with common features. . . . .	217
6.19	On OGA, 'Profile 1' is now changed to 'Mary'. . . . .	219
6.20	User Mary is given OGA rights and is also assessed the OGA profile as created for her. . . . .	219
6.21	Setting full rights to user Mary on all account numbers. . . . .	220
6.22	Creating a new account. . . . .	222
6.23	These account properties are modifiable. . . . .	224
6.24	Looking for all accounts beginning by '1'. . . . .	225
6.25	Viewing accounts belonging to a certain range. . . . .	225
6.26	This menu enables to take dedicated actions on one specific account. . . .	226
6.27	Looking for postings done on a specific account. . . . .	226
6.28	The value date, reference, label and journal for a specific posting can be modified. . . . .	227
6.29	Viewing the balances on a specific account range. . . . .	228
6.30	Creating a new journal for year 2009, of the 'General' type, with authorized modifications and reconciliations. . . . .	229
6.31	This OGA posting and its counterpart correspond to a previously-made invoiced order automatically imported to OGA thanks to the External System. . . . .	230
6.32	Updating the opening balance of the current selected year. . . . .	231
6.33	Changing the current year to 2009. . . . .	232
6.34	Recording a debit transaction line on account '410102' : the corresponding tax line is calculated and added automatically. . . . .	233
6.35	The counterpart has been recorded in a similar way as above (on the corresponding counterpart account and 'Credit' chosen instead of debit) and balance is therefore null : posting can be validated. . . . .	234
6.36	Like reference, date and journal, this document will be a propriety of this transaction. . . . .	235
6.37	An 2010 invoice, that was not exported on time, is properly recorded in OGA. . . . .	236
6.38	Looking for transactions containing 'replacements' and displaying them. .	237
6.39	An extract of the PDF file that can be generated through a posting search..	238
6.40	Achieving reconciliations on a specific account. . . . .	239
6.41	Generating the General Ledger for the year 2009. . . . .	240
6.42	The <i>Summary Sheets Page</i> . . . . .	240



6.43	Adding a new summary sheet of the "Balance sheet" type ; modifying the title of an already-existing one. . . . .	241
6.44	Default contents for a Balance Sheet. . . . .	242
6.45	Adding a new account sum in <b>LIABILITIES</b> . . . . .	243
6.46	Modifying the account sum "Fixed assets". . . . .	244
6.47	Adding a sub-total line to display sum of elements 'Fixed assets' and 'Stocks'. . . . .	244
6.48	Generating the balance sheet for the year 2010. . . . .	245
6.49	The PDF version of the previous. . . . .	246
6.50	The CSV version, as opened in a spreadsheet software. . . . .	246
6.51	Expanding a summary sheet's element and viewing postings made on an account. . . . .	247
7.1	Setting admin's rights to send news to every user group. . . . .	250
7.2	Writing a piece of news aimed to be sent to every user group. . . . .	250
7.3	Publishing a recently-created piece of news. . . . .	251
7.4	Two ways of seeing recently-published news. . . . .	251
7.5	The <i>Agenda Administration Page</i> , with buttons designed to configure agenda display and rights. . . . .	253
7.6	Creating a RV type called 'New Product Test'. . . . .	253
7.7	Choosing a color. . . . .	254
7.8	Creating a agenda that will be used by user group 'Sales Department'. . . . .	255
7.9	Defining the 'Sales Department' agenda style. . . . .	256
7.10	Adding the RV type 'New Product Testing' to the 'Sales Dept.' agenda. . . . .	257
7.11	The own <b>agendas</b> of Tom, Dick and Harry are added into user-group-oriented 'Sales Dept. Agenda' ; as a result, these three agendas are all featured when displaying the 'Sales Dept. Agenda'. . . . .	258
7.12	Setting the rights of a user group to agendas. . . . .	259
7.13	The 'Sales Department' agenda is set as Tom's default one. . . . .	259
7.14	The <i>Main Agenda Page</i> . . . . .	260
7.15	Adding an appointment for a client. . . . .	261
7.16	The now-scheduled appointment. . . . .	262
7.17	While the 'Other object' button is always available whatever agenda style is, the 'No client one is only there if agenda style has optional client. . . . .	262
7.18	Viewing an appointment's details, which some of those can be modified. . . . .	263
7.19	This appointment is imminent ; clicking on the <a href="#">more</a> link will lead to the <i>Main Agenda Page</i> for the current week, while clicking on the link below "1 appointment(s) today !" will lead to the page for that very appointment. . . . .	264
7.20	Setting a new alarm. . . . .	265
7.21	Managing an alarm. . . . .	266
7.22	Alarms appear here on their due date. . . . .	266
7.23	The <i>File Manager Page</i> . . . . .	267
7.24	Creating the new folder '2011' at the 'Our product research' directory. . . . .	268
7.25	Setting the rights for the folder 'List of ingredients'. . . . .	270
7.26	The user rights that rule Lists of Tasks. . . . .	271
7.27	Creating a new task list model. . . . .	272
7.28	The <i>Task List Model Modify Page</i> . . . . .	273

7.29	Usergroup-related access rights for task list model 'Water fountains'.	273
7.30	Adding a task type for task list model 'Water fountains'.	274
7.31	Opening task list 'Water fountains'.	275
7.32	The 'Tasks' view.	277
7.33	Declaring these tasks as done.	277
7.34	Options by which updating a task.	278
7.35	Printout of a closed task list.	279
7.36	A done task that, upon inspection, did not fulfill the review, is opened again. Execution date is back to 'none'.	280
7.37	The user rights that rule Properties.	281
7.38	Creating a new property aimed at clients, consisting in Yes or No choices.	282
7.39	Modifying property 'ID registered'.	284
7.40	This property applying to clients will only accepts documents for its value.	285
7.41	Setting the property 'ID registered' to 'Yes' for client John Smith.	286
7.42	This allows a property to be changed or removed.	287
7.43	Adding an other property for a client.	288
7.44	The two previously-set properties are now featured.	288
7.45	The <i>Mail Management Page</i> .	290
7.46	"Entering" a newly-received and scanned document into Blue Chameleon.	291
7.47	A document with all its main information.	292
7.48	Details of a mail document.	292
7.49	A short summary of the ticket created along the mail document ; from there, this associated ticket can be managed.	293
7.50	Attaching a reply to mail document 'Tax Form, 2011'.	294
7.51	In this example, mail document 'Tax Form, 2011' is being attached to mail document 'FINC. MERGE 2011'.	295
7.52	These are "linked" documents.	296
7.53	The user rights that rule Customer Relationship Manager.	299
7.54	CRM's Main Page.	299
7.55	Adding a prospect.	301
7.56	A <i>Prospects.csv</i> file, listing prospect data its own way is uploaded to CRM, on which matchings are made between the file's information (on the left, retrieved from its first line) and CRM's own prospect data presentation (menus on the right).	302
7.57	This <i>Preview Page</i> shows that the prospect data has been rightly imported.	303
7.58	Looking for clients and prospects whose name begins by 'S' inside the contact database.	304
7.59	Creating a contact list aimed to gather contacts living in the same city.	304
7.60	Adding contacts to a contact list.	305
7.61	Registering an appointment taken with a contact ; the due date as it appears has been set in the way described at Fig.7.62.	307
7.62	Setting the right date and time for a future action.	308
7.63	Indicating an information upon a prospect's state.	309
7.64	This displays for instance all phone-call actions remaining to be done.	310
7.65	An action can be modified and updated anytime.	311

7.66	The CRM event control, here reminding that an appointment with a client is scheduled. . . . .	311
7.67	Creating a new postal campaign. . . . .	312
7.68	This page allows to manage a campaign (for which, currently, no contact list nor document have been added). . . . .	313
7.69	Adding the right contact list (7.9.3.5) to a postal campaign. . . . .	313
7.70	Uploading the model document "New Offer" (see 13.3 for details on its creation) and generating the corresponding PDF file. . . . .	314
7.71	Marking as postal campaign as 'sent'. . . . .	315
7.72	Making a copy of a 'sent' campaign. . . . .	316
7.73	Creating the header of the electronic campaign 'Weekly Newsletter'. . . . .	317
7.74	Creating a PDF file that sums up the electronic campaign. . . . .	317
7.75	The PDF file generated for an electronic campaign features the campaign's general information as well as the contents of the emails sent to each member of the contact list. . . . .	318
7.76	Creating a new postal letter for prospect Max Burr. . . . .	320
7.77	This page allows to do any letter-related action in the same way as for campaigns. . . . .	321
7.78	Creating a new predefined form model. . . . .	322
7.79	Generating a form ready to be printed out for client John Smith. . . . .	322
7.80	An example of a form to be printed out. . . . .	323
7.81	Sending a dedicated email right from the client's page, and also creating an action for the record. . . . .	324
7.82	A complete, numerical view on actions. . . . .	325
7.83	These are the actions statistics pertaining to all contacts of a contact list. . . . .	326
7.84	The user rights that rule Projects and Timesheets, for a 'manager' user. . . . .	327
7.85	The <i>Projects and Timesheets Main Page</i> . . . . .	328
7.86	Adding a new project for a client. . . . .	330
7.87	This page allows to manage and access all data related to a project. . . . .	331
7.88	Updating a project. . . . .	332
7.89	Adding an action for a project. . . . .	332
7.90	Adding a service article to be used for this project's timesheet. . . . .	333
7.91	Adding a task for a project. . . . .	334
7.92	From here, a task can be managed. . . . .	335
7.93	An interface to look for tasks. . . . .	336
7.94	An example of project planning. . . . .	337
7.95	From here, users' billing preferences and services can be managed. . . . .	338
7.96	The <i>Timesheet Page</i> . . . . .	339
7.97	Creating a service timesheet. . . . .	340
7.98	Creating an article timesheet. . . . .	343
7.99	Modifying an article timesheet. . . . .	344
7.100	Printing options. . . . .	345
7.101	The <i>Invoice Timesheet Page</i> : choosing the timesheets to invoice. . . . .	346
7.102	From here, quantities/durations and labels may be updated. . . . .	347
7.103	The pre-invoice, just after it saved as a draft. . . . .	348
7.104	Full details of a series of invoiced timesheet, which can be printed out. . . . .	350

7.105	The user rights that rule Human Resource Manager ; <b>these values are ideal for a non-manager user that is a head of group</b> (he can indeed plan holidays, sick leaves and activities for users belonging to his group).	352
7.106	The <i>Main Planning Page</i> , showing the planning of all users (with an <i>enabled</i> access) in "Sales Department" user group. . . . .	354
7.107	The User Information pop-up. . . . .	355
7.108	The Manage Day pop-up for user Tom. . . . .	356
7.109	The <i>Planning Administration Page</i> . . . . .	357
7.110	Creating a workweek profile with a Wednesday afternoon off and a worked Saturday morning. First, the four hours of Wednesday afternoon are clicked to be declared as un-worked ; then, <b>Saturday</b> is clicked to be declared as worked and finally the four hours of Saturday afternoon (now in white) are clicked to be declared as un-worked. . . . .	358
7.111	Viewing the workweek profile as previously created. . . . .	359
7.112	Creating a workday profile, defining a day worked from 10AM to 1PM and 2PM to 6PM. . . . .	360
7.113	The <i>Manage Staff Page</i> , offering extensive data on Blue Chameleon users relating to the Planning. . . . .	361
7.114	The <i>Manage Employee Page</i> : human-resource data of a user inside Blue Chameleon. . . . .	362
7.115	Two ways by which to configure the weekly schedules of an employee. . .	363
7.116	Filling the plannings by default for year 2013 ; it is to note that the fill does not affect temporary employees (whose exit date is within the current year) and unconfigured employees (respectively Dwayne Lavereau and Robert Zmuda in this example). . . . .	365
7.117	Defining a new activity category 'Salesmen'. . . . .	366
7.118	Defining an activity 'Biz trip', related to category Salesmen. . . . .	366
7.119	User Thomas is set as the receiver of Richard's holiday request notifications and confirmations. . . . .	367
7.120	Days and hours as worked by the Sales Department for June 2012. . . . .	368
7.121	Defining a team 'Report Writers'. . . . .	369
7.122	User Jack Jones views his confirmed 2011 holidays. . . . .	370
7.123	Defining new holidays, directly from the Holiday planning. . . . .	371
7.124	Once start and end dates have been chosen, new holidays can be finally validated. . . . .	371
7.125	User Jack views his confirmed holidays. . . . .	372
7.126	Showing the choices to which modify the Wednesday of this holiday request.	373
7.127	Defining a schedule for this Wednesday, where off-time is counted in a matter of hours and minutes. . . . .	374
7.128	The <i>Holiday History Page</i> . . . . .	376
7.129	The <i>Manage Users' Holidays Page</i> . . . . .	376
7.130	The HRM event control, displaying pending holiday requests to process. .	377
7.131	The displaying of full user group's schedule helps to decide whether to accept or not user's requested holidays. . . . .	377
7.132	Tom, a holiday supervisor for his own group, views Richard's unconfirmed holidays and can give his opinion on them. . . . .	379

7.133	An example where some extra holidays are credited to a few selected users.	380
7.134	Declaring this Saturday morning as worked.	381
7.135	Accessing the details of a workday.	382
7.136	The work history for this user on November 2011.	384
7.137	Crediting overtime as vacation time.	385
7.138	Changing Tom's activities for a day.	386
7.139	Setting activities for a whole week or a whole month.	388
8.1	The main <i>Customer Support Page</i> , ready to create a ticket for client John Smith.	391
8.2	The <i>New Ticket Page</i> displaying client information and allowing to pick ticket type parameter and to type a notification email to the issuing client.	392
8.3	Creating a ticket for any object, pertaining to people (clients, prospects (7.9.3.1)), items (articles, subscriptions), invoices, orders...	393
8.4	The <i>Customer Support Page</i> , displaying the recently-created ticket for client John Smith. The <a href="#">View</a> link at the far right of the table leads to the <i>View Ticket Page</i> (8.5) for this particular ticket.	394
8.5	The <i>View Ticket Page</i> , enabling to execute all of ticket-related activities.	396
8.6	The 'new' ticket is set to 'open' and also a comment consisting in the problem's description is given for the record.	397
8.7	Ticket is forwarded to External Relations group member Mary.	397
8.8	User Mary receives ticket and processes it according to her External Relations skills, and also informs client.	398
8.9	Problem is solved and therefore ticket is closed.	399
8.10	Full history of the current example ticket's solving.	400
8.11	A log of James' activity on the day when the example client complaint was issued.	402
8.12	From here, ticket statistics can displayed according to date and user groups, with three kinds of tables	403
8.13	The Global Statistics table.	403
8.14	This table sorts tickets by ticket types and issuing user.	403
8.15	This table takes interest into a particular category.	403
9.1	The <i>Merchant Configuration Page</i> .	406
9.2	Here, set your company's head office general information.	407
9.3	Defining other offices.	408
9.4	Modifying alternative address.	408
9.5	Choosing preferences for clients.	408
9.6	Choosing preferences when dealing with articles.	409
9.7	Choosing preferences when ordering.	410
9.8	Choosing preferences related to invoices, payments and credit control.	412
9.9	Enabling or disabling menu custom scripts and system task managements.	412
9.10	Defining the currency on which anything related to prices will rely.	413
9.11	Setting countries from which to accept orders and their zone ; setting language in which Blue Chameleon is displayed <i>by default</i> .	414
9.12	Adding a new shop.	415
9.13	Creating a cash register named "CR 1" for shop Iguana Food Store.	416

9.14	Adding a new reseller. . . . .	417
9.15	Adding the new user group 'Customer Support Group'. . . . .	418
9.16	The <i>User List Page</i> . . . . .	418
9.17	Configuring Tom's user account, and assessing his rights temporarily from admin. . . . .	421
9.18	Creating a 'Normal' SLA class. . . . .	422
9.19	'Normal', 'Prioritary' and 'Urgent' service level agreements have been created and are now available to be assessed to ticket priority. . . . .	423
9.20	Adding a new salesperson, who is already a user. . . . .	424
9.21	Adding a commission for article 'At-Home Help, basic'. . . . .	425
9.22	Adding a new commission contract. . . . .	425
9.23	Viewing current images and uploading one to be used in this example as a Shop logo. . . . .	427
9.24	Adding an icon for an article. . . . .	428
9.25	The system task manager event control, showing one running task and one finished ; accessing the details of the latter. . . . .	429
9.26	Viewing system tasks pertaining to temporary invoice validating that have been closed. . . . .	430
9.27	Selecting a day and a time interval to schedule tasks. . . . .	431
9.28	Building a scheduler task that consists in weekly calling in the script to remind open invoices. . . . .	431
9.29	Launching the (weekly) execution of a scheduler script. . . . .	432
10.1	The Ticket administration menu. . . . .	433
10.2	Forwarding tickets for Sales Department user Harry to same user group member Dick, for two weeks. . . . .	434
10.3	The <i>List of Ticket Types Page</i> , allowing to make ticket genres as accurate as possible. . . . .	435
10.4	Main data for new ticket type 'Customer', aimed at client complaints. . . . .	436
10.5	Other data to configure a ticket type with. . . . .	437
10.6	( <i>Left :</i> ) Creating the 'Complaint' category for the 'Customer' ticket type ; ( <i>Right :</i> ) creating the 'Product' parameter for the 'Complaint' category. . . . .	438
10.7	Creating a predefined email to the client meaning that the her/his request is being processed. . . . .	438
10.8	Creating a predefined public answer meaning the ticket is being processed. . . . .	439
10.9	Creating a predefined ticket duration of one hour. After, when adding an action, this duration will be readily available at the 'Duration:' menu. . . . .	440
10.10	Creating a new ticket style, aimed for the "Supplier" ticket type ; it is then assessed to this type through the ticket type's page. . . . .	441
10.11	A ticket of the "Supplier" type, appearing with the style as defined at Fig.10.10. . . . .	442
10.12	Unticking the 'default' boxes for a particular ticket switches the style to the optional colors and afterwards, in the Ticket Table, makes it be distinguished from the others at a glance. . . . .	442
10.13	The ticket configuration for a user, mostly ruling view/assignment ticket rights. . . . .	443

10.14	Giving to the Customer Support user group the possibility to issue tickets of the 'Supplier' type. . . . .	445
11.1	For the 'payment management' component, users are assessed different rights according to their role in the company. . . . .	449
12.1	The <i>Menu Management Page</i> enables to accomplish any menu personalization. . . . .	451
12.2	( <i>Top :</i> ) First clicking on 'A' besides 'General' displays its submenu, then clicking on 'Misc's 'A' displays the menu it itself contains. ( <i>Bottom :</i> ) Following that path shows the actual result of that structuring. . . . .	453
13.1	The Document Editor. . . . .	455
13.2	Highlighting text. . . . .	456
13.3	List of the Editor's available fonts. . . . .	456
13.4	Creating and selecting a custom color. . . . .	457
13.5	Available special characters. . . . .	458
13.6	This bit of text, when related document will be dispatched as an electronic campaign, is clickable and leads to the entered website. . . . .	459
13.7	Creating an enumerated list. . . . .	459
13.8	An example on how to use the advanced plan possibilities. . . . .	460
13.9	How to climb up the plan's hierarchy. . . . .	460
13.10	Inserting a table of 3 rows and 4 columns. . . . .	461
13.11	How to select an entire table to operate on it (alignment, copying,...) and how to select cells . . . . .	461
13.12	This window allows to set table properties. . . . .	462
13.13	This window allows to set cell properties. . . . .	463
13.14	Merging a table's cells. . . . .	464
13.15	Removing the outer borders of one cell. . . . .	464
13.16	Putting custom colors on the borders and background of a table cell. . . . .	465
13.17	Creating a table with even inner and outer borders. . . . .	466
13.18	Creating a table with outer borders only. . . . .	466
13.19	Creating a table with inner borders only. . . . .	467
13.20	Expanding a table by two rows. . . . .	467
13.21	Removing these two selected rows. . . . .	468
13.22	Inserting an image into a document. . . . .	469
13.23	Resizing a document image. . . . .	469
13.24	Putting clients' variables, that will be afterwards translated as client data. . . . .	470
13.25	The page which serves to create a 'All-Purpose Print Template' to be used in two contexts, CRM and invoices. . . . .	472
13.26	The 'Header:' Editor Panel, enabling here to design a right-aligned company logo and general information. . . . .	473
13.27	The 'Footer:' Editor Panel. . . . .	473
13.28	The 'All-Purpose Print Template' as it will appear on PDF-generated documents. . . . .	474
13.29	Creating a new model document. . . . .	475
13.30	Selecting a document. . . . .	476

14.1	An invoice search, led under 'Print version'.	491
14.2	Setting two different colors for two appointment types.	496
15.1	This important page enables to accomplish any campaign-related deed.	504
15.2	Including a picture as a link to the web link where it has been uploaded.	510
15.3	Creating a dedicated folder to keep in templates of documents.	511
15.4	An example of a template for newsletters, that is to be saved under the folder /CRM/Email Templates.	512
15.5	Opening a previously-made template for an electronic newsletter and saving it under a new name, in a dedicated folder.	513



# List of Tables



# Chapter 0

## Blue Chameleon Setup Guide

### 1. *Merchant creation and quick configuration :*

- (a) Fill in your company's general information (9.1.1) ;
- (b) Settings to do :
  - i. set Default User Group as Administrator (9.1.1) ;
  - ii. set Suppliers as enabled, if you wish to include them (9.6) ;
  - iii. set credit control as enabled (9.8) ;
  - iv. define supported currencies (9.10) ;
- (c) Shop(s) creation (9.2) ;
- (d) User groups creation (9.4.1) ;
- (e) Admin- and user(s)- related setups (9.4.2) :
  - i. fill in their general information ;
  - ii. copy user(s) rights from admin ;
- (f) Define service level agreements (9.5).

*If you wish to use stock management :*  
Set Stock Management as Physical (9.6)

*If you wish to manage some articles as subscriptions :*  
Set Article Subscriptions as enabled (9.6)

*If you wish to manage salespersons :*  
Set Salespersons as enabled (9.1.5)

*If you wish to use the External System :*  
Set External Account Management as either 'manual export' or 'automatic export' (9.8)

## 2. *Invoicing, accounting and payment setups :*

- (a) Define a credit control class (5.6.6.1) ;
- (b) External accounts creation (6.1.1) ;
- (c) Bank accounts creation (6.2.1) ;
- (d) Credit note accounts creation (6.2.2) ;
- (e) Cash-box accounts creation (6.2.3) ;
- (f) Tax categories creation (6.3.1), and then assessing them to 'Countries where order are accepted from' (9.1.9) ;
- (g) Tax codes creation (6.3.2) ;
- (h) Article delivery methods creation (4.5.1) ;
- (i) Invoice (and, if needed, reminder) delivery methods creation (5.4.4) ;
- (j) Payment methods creation (6.4.1) ;
- (k) Assigning supported delivery methods to payment methods (6.4.1.1).

## 3. *Main databases creation :*

- (a) Clients creation (2.1) ;
- (b) Articles creation (3.1.1).

*If you wish to use stock management :*

- (a) Stock locations creation (3.6.1.1) ;
- (b) Suppliers creation (3.6.1.2) (if you wish to include them) ;
- (c) Stock categories and articles creation (3.6.1.3 and 3.6.1.4) ;
- (d) As pictured as an example in Fig.3.10, for the relevant categories, pick either 'optional/required stock delivery' and also associate them with the corresponding stock categories ; then, for the relevant articles, associate them with the corresponding stock articles.

*If you wish to manage some articles as subscriptions :*

Subscription articles creation (3.7.1.1)

*If you wish to manage salespersons :*

Salespersons creation (9.6.1)

4. *Non-prioritary elements :*

- (a) Defining work sets for invoices and reminders (5.5.2.1) ;
- (b) News rights setup (7.1.1) ;
- (c) Agenda general setup (7.2.1) ;
- (d) Helpdesk general setup (8.1) ;
- (e) User rights regulation (*Advanced Functions and Configuring*,11).

*If you use Online General Accounting add-on :*

- (a) follow the "First time using OGA" guideline (6.5.2) ;
- (b) creation of OGA accounts (6.5.3.1), (if you plan on using exporting functions) accordingly to already-existing external accounts (6.1.1) ;
- (c) set OGA access to user(s) (6.5.1.1), then set her/his/their rights on accounts (6.5.1.2).

*If you use Customer Relationship Manager add-on :*

print templates definition (*Advanced Functions and Configuring*,13.2)

*If you use Human Resource Manager add-on :*

HRM general setup (7.11.1)



# Chapter 1

## General Interface Handling

In this Chapter, you are going to know everything you need to personalize Blue Chameleon to your needs.

Blue Chameleon's screen, as displayed upon login on our site, is featured at Fig.1.1.

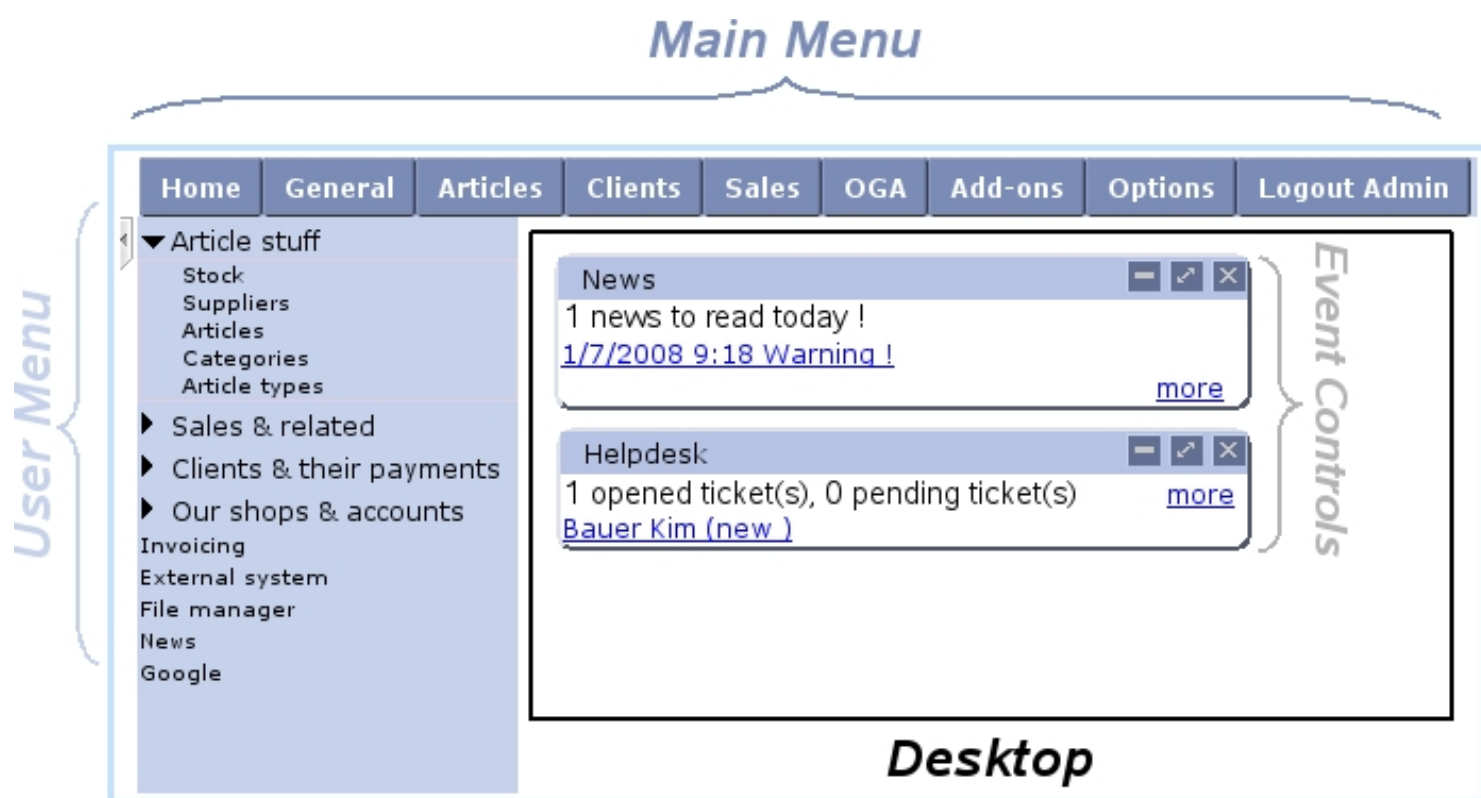


Figure 1.1: Blue Chameleon's screen.

It is composed of :

- a Main Menu, made of *command groups* that represent Blue Chameleon's main components : articles, clients, accounting,... ;

- a User Menu, which is built from Main Menu items according to the user's particular needs ;
- a Desktop, which is where *Pages* display, forms are filled, actions are taken... it is also where, upon login, Event Controls (see 1.3) are displayed.

## 1.1 Writing conventions and main menu basics

In this document, a command group will be referred as **Command group**. Except for **Home** and **Logout** command groups, clicking on a command group generally displays a submenu with several choices, as shown on Fig.1.2 with for instance the **Articles** command group.

Clicking on one of these choices then leads to a page that displays in the Desktop ; for example, clicking on **Stock** (submenu elements will always be referred to as this) brings to a "*Stock Management Page*" where are displayed **buttons**.

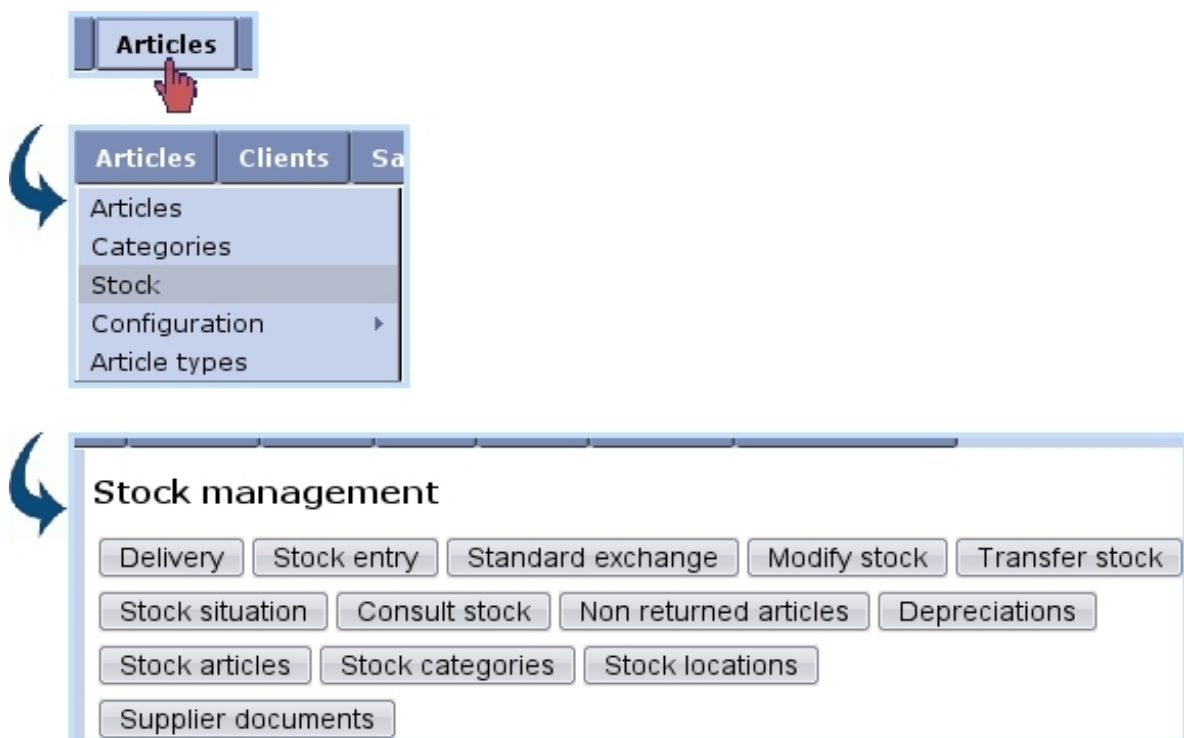


Figure 1.2: Easily accessing a page.

Clicking on any of these buttons finally leads to a dedicated page.

As a convention in this document, the path to access a specific button will be written as, for the example cited above :



**Articles** / **Stock** / **Consult stock**

Throughout this manual, these color conventions will always be complied to so that no place is left for ambiguity, whenever a submenu element shows another submenu (for instance **General** / **Users** / **User rights**) or a page needs a succession of button clicks to be accessed (for instance **Add-ons** / **News** / **Publish** / **Add news**).

Also, click-links in Blue Chameleon (that generally leading to a detail/description page related to a client, an article,...) will be referred to as, for example, [Smith John](#).

Expressions written inbetween [...] refer to a context : [HOME],... or to an accomplished action : [Client Search],...

It is finally possible to arrange the Main Menu's items, rename them... ; an in-depth how-to on this matter is proposed at *Advanced Functions and Configuring* (12).

## 1.2 User Menu management

As it has been seen above, accessing a certain page may sometimes necessitate to go through several menus ; what is more, some pages are accessed far more often than others. Therefore, Blue Chameleon provides the User Menu of the main screen for you to add your most used menu elements.

### 1.2.1 Adding links

The configuration of the User Menu is accessed by right-clicking anywhere in it ; on subsequent menu, as featured in Fig.1.3, pick **Add link**. This will show a window with all menus and submenus, displayed/hidden by clicking on / ; then click on the menu item you want the User Menu to feature (in this example, 'Articles') and validate by **Add**.

Fig.1.4 shows for instance a User Menu designed for users that will be working mostly on article matters : clicking on 'Suppliers' then brings directly to the *Suppliers Management Page*, which would have been accessed normally via two menus (**General** / **Merchant** / **Suppliers**).

The grey arrow on the top left of the User Menu may be used to hide/show it.

### 1.2.2 Adding URLs

URLs can also be added through the right-click menu via **Add URL**.

[User Menu : right-click anywhere]

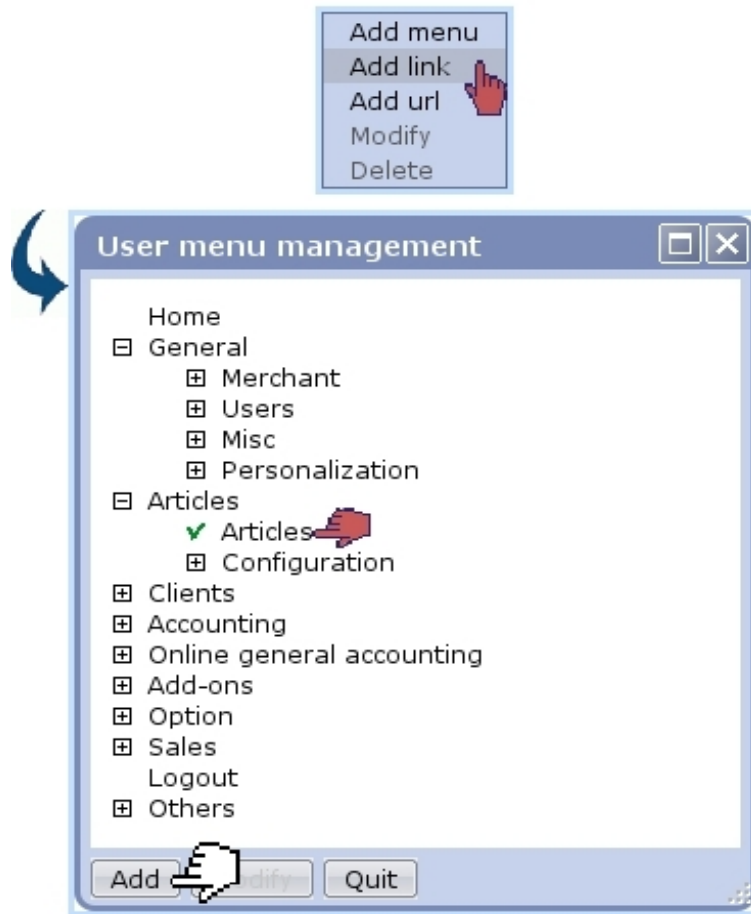


Figure 1.3: Adding the menu element 'Articles' to the User Menu.

### Hide/Show User Menu



Figure 1.4: Clicking on one element of the User Menu displays the corresponding page.

### 1.2.3 Link management

If a link in the User Menu should be deleted, this is achieved by right-clicking on this link and picking **Delete**. Or, if a link should be better replaced by another, choose this time **Modify**: the same window as for link add will be displayed, where you can now pick the menu element that fits this place better.

Finally, a link can be displaced by holding a click on this link and moving it to the wanted place.

## 1.2.4 Adding menus

If you wish to gather links according to their function, it is possible to create a menu to do so. This may seem to eventually achieve the same result as the Main Menu and its submenus, but as a matter of fact, you can now group some related menu elements that did not belong to the same command group.

For instance, 'Suppliers' may be useful in the context of 'Stock' (as adding a stock article requires a supplier to be defined), but they belong respectively to the **General** and **Articles** command groups. They could therefore be gathered into a 'Article stuff' side menu, whose creation is shown at Fig.1.5 ; **Add menu** is this time what to choose from a right-click on the User Menu zone, and the new menu's name is validated with the return key.

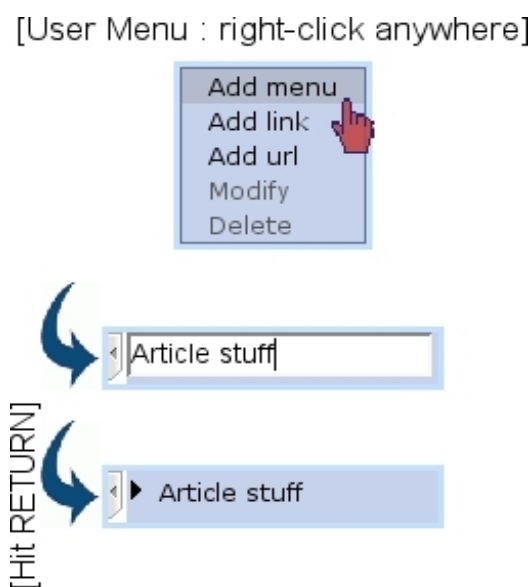


Figure 1.5: The creation of a User Menu menu called 'Article Stuff'.

Then, links are added inside this menu in a similar way as described in 1.2.1, but this time the right-click is done *on* the menu's name. A menu's contents are displayed/hidden by clicking on ►/◄ on the left of its name.

Fig.1.6 finally shows the end result of creating a few menus.

Similarly as for links, User Menu menus can be deleted (provided they do not contain any link), modified and moved.



Figure 1.6: An example of what can be achieved with User Menu menus.

## 1.3 Event Controls

Event Controls are designed to display miscellaneous information as a user logs in on her/his Blue Chameleon account or clicks on **Home**. They come in particularly handy for :

- domiciliation orders to be activated ('Billboard', 5.10.5.1) ;
- news (7.1) ;
- the current day's appointments (7.2) ;
- alarms (7.3) ;
- if applicable the Customer Relationship Manager's actions (7.9.4) ;
- employees' vacation requests (7.11.5.7) ;
- incoming tickets (8) ;
- system tasks (9.8).

### 1.3.1 Setting up Event Controls

Blue Chameleon lets you pick which Event Controls you wish to be displayed ; to do so, follow **Options** / **Configure desktop**. On subsequent screen as shown at Fig.1.7, tick the corresponding Event Controls.

For instance, the result of an incoming news message can be seen at Fig.7.4.

### 1.3.2 Managing Event Controls

Most of the following functions are accessible from the top right of that Event Control and/or through event Control menu, as displayed when right-clicking when cursor is over an Event Control's blue top.

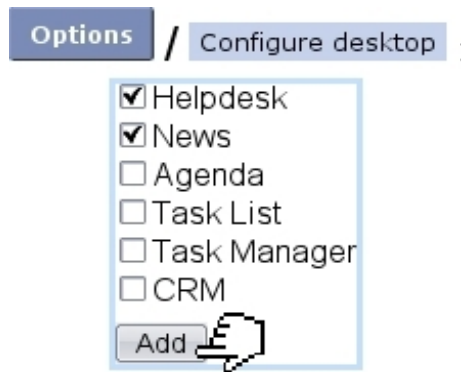


Figure 1.7: Setting the display with 'Helpdesk' and 'News' Event Controls.

### 1.3.2.1 Displacing

A single click on the blue-hued top of an Event Control and then a single click on a free zone of the Desktop (or even in-between two event controls) simply displaces it there.

### 1.3.2.2 Minimizing / Maximizing

In order to hide the contents of an Event Control on the whole Blue Chameleon Desktop, click on **Minimize** on the top right of that Event Control. They can then be shown again via **Maximize**. Or, through the right-click menu, click on either **Minimize** or **Maximize**.

### 1.3.2.3 Closing

In order to disable the displaying of an Event Control on the Blue Chameleon Desktop, click on **×** on the top right of that Event Control, or click on **Close** on the right-click menu.

Another way of achieving this is to simply untick (*work in progress*) the corresponding Event Control from the **Options / Configure desktop** page.

### 1.3.2.4 Full-desktop display

In order to display the contents of an Event Control on the whole Blue Chameleon Desktop, click on **☑** on the top right of that Event Control.

### 1.3.2.5 Event Control menu options

**Options**, as found on the right-click menu of an Event Control, brings the pop-up as displayed on Fig.1.8 where :

- the "coordinates" of the event control are displayed ('column 1' or '2' meaning whether event control is on the left or right side of the Desktop, 'line' telling how low event control is in that column, starting from 1 (top)) ;

- the dimensions (in pixels) of the event control are displayed ; width is fixed at '0' (meaning half of the Desktop) and height can be modified, set by default at 0, i.e. the minimum height that embeds the event control's contents ;
- the status of the event control, 'Maximized' or 'Minimized' (1.3.2.2) is shown ;
- the title of the even control can be altered.

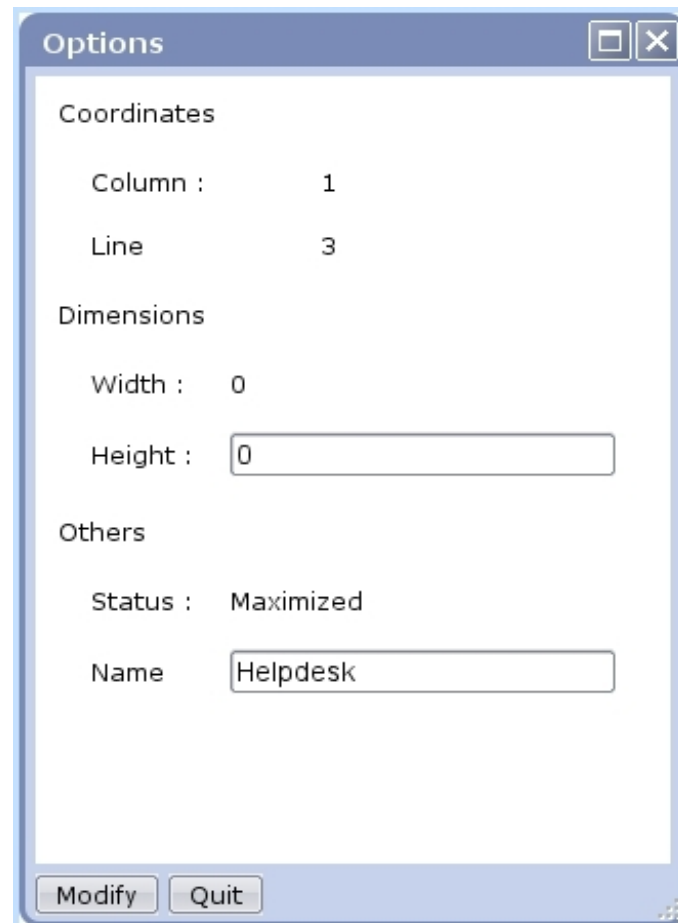

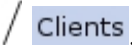


Figure 1.8: This pop-up enables to fix an Event Control's name and height.

# Chapter 2

## Client Management

This Chapter explains how to build your client database in the efficient way provided by Blue Chameleon.


All commands explained in this chapter are accessible from  / .



*User rights for client management (adding, viewing, modifying,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Client management

## 2.1 Adding a new client

The path above leads to the *View Client Page* (Fig.2.4) which provides a  button along with a client search tool (2.2.1). Clicking this button then leads to the *Add Client Page* as featured on Fig.2.1, where you can fill in the general data pertaining to this new client :

- her/his personal information such as name and first name ; for professional clients (2.1.1), this is the Company name ;
- the ways to reach her/him, i.e. address, zip code, city, email address, phone and fax numbers.

At the bottom of the page, a 'Comment:' field is available so that you may leave a few notes.

A few drop-down menus also let you fulfill further the new client's description :

- a username and password, which can be left blank if you had set 'Client logins' as 'disabled' on the *Modify Merchant Page* (9.1.3) ;

- her/his title (Mr/Mrs/Miss/...) ;
- her/his type (2.1.1), if applicable ;
- the country s/he lives in (supported countries are set on the *Merchant Configuration Page*, 9.1.9) ;
- her/his preferred language for email communication, phone calls... ;
- whether this data will be read-only in Front Office ;
- her/his billing status, to set to 'Ok' for now (5.9.1) ;
- a service level agreement for this new client (9.5) ;
- a credit control class (5.6.6.1) ;
- an associated default or specific 'client' external account (6.1.1).

Lastly, a tick box serves to mean that this client will be allowed multiple invoices.

If you happen to spot a mistake on a recently created and validated new client's profile, it is of course possible for you to amend it (2.2.3).

### 2.1.1 Types of persons/clients

If in your activity you handle physical persons or corporate bodies (and/or if they can be professional or private clients), you may want to enable distinct client types at the *Modify Merchant Page* (9.1.3).

For that matter, two new menus 'Type of person:' (physical person/corporate body) and 'Type of client:' (private/professional) will be then available at the *Add Client Page*.

### 2.1.2 Client attributes



*User rights for client attribute handling can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

#### **Client attribute management**

The form to add a new client, as featured at Fig.2.1, contains various fields which can be in fact configured. The various *client attributes* can be accessed as shown in Fig.2.2, where a "phone" field is added.

Apart from the attribute type (title, name, address line, phone, email,...) and the matching validation script, a toggle renders this attribute optional or not. The utility of this feature is explained below.



Clients / 
 Clients / 
 Add new client :

### Add client

Username:	<input type="text" value="Smith.John"/>		
Password:	<input type="text" value="jsmith.88K"/>		
Company **:	<input type="text"/>		
Title:	<input type="text" value="Mr"/> ▾		
Name **:	<input type="text" value="Smith"/>		
First name:	<input type="text" value="John"/>		
Address Line 1 *:	<input type="text" value="12 Orange Road"/>		
	...		
Zip code * / City *:	<input type="text" value="90000"/>	<input type="text" value="Los Angeles"/>	
Country *:	<input type="text" value="USA"/> ▾		
Phone / Office:	<input type="text" value="555 1234"/>	<input type="text"/>	
Mobile / Fax:	<input type="text"/>	<input type="text"/>	
E-mail address:	<input type="text" value="john.smith@mailserv.com"/>		
Preferred language:	<input type="text" value="English"/> ▾		
Read Only in Front Office:	<input type="text" value="no"/> ▾		
Allow multiple invoices:	<input type="checkbox"/>		
Hide other client's name on invoices:	<input type="checkbox"/>		
Client invoices:	<input type="text" value="Tax incl."/> ▾		
VAT #:	<input type="text"/>		
Credit control class:	<input type="text" value="&lt;none&gt;"/> ▾		
Billing:	<input type="text" value="Ok"/> ▾		
SLA:	<input type="text" value="Normal"/> ▾		
External account:	<input type="text" value="&lt; Default &gt;"/> ▾		
Comment:	<input type="text"/>		

(\*) required  
 (\*\*) Name or company required

Add
Cancel

Figure 2.1: Adding a new client.

### 2.1.2.1 Making some client data optional or mandatory

In your activity, you might want each client to be created requiring a particular piece of information, such as for example a phone number. For this requirement to be enforced,

[Clients](#) / [Personalization](#) / [Client attributes](#) / [Add new client attribute](#)

### Add client attribute

Attribute type:

Optional:  Yes  No

Validation script:

50

## 2.2.1 Running client searches

Searches are led from the *View Clients Page*, as displayed on Fig.2.4 ; there, several search options are proposed :

- by general information (name or username, email, reference, address,...) ;
- by domiciliation reference (5.10) ;
- by clients who have already made orders ('Clients with order and invoice only'), or those for whom a defined salesperson (9.6.1) created an order ;
- by credit control class (5.6.6.1) ;
- by service level agreement (9.5) ;
- by type of person (2.1.1) ;
- by clients registered at least since a certain date.

Clients / Clients :

**Search clients**

Name/Username:  Email/Tel:  Reference:

Address:  Zip code/City:  Country:

Domiciliation ref.:  Salesperson:  Credit class:

Type:  Clients:  Type of person/SLA:

Client since: <none>

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

<a href="#">Scofield Michael</a>	Scofield.Michael	Los Angeles	<input type="button" value="Modify"/>	<input type="button" value="Transfer to other client"/>
<a href="#">Smith John</a>	Smith.John	Los Angeles	<input type="button" value="Modify"/>	<input type="button" value="Transfer to other client"/>

Figure 2.4: The *View Clients Page*, allowing to run searches.

Also, client search can be run by clicking on one of the [A](#), [B](#),... letters : one way or the other leads to the displaying of all clients whose name begins by that group of letters or that initial.

Of course, several of these search criteria can be combined to run accurate searches.

Once a client (or a list thereof) has been displayed thanks to a search, clicking her/his name will lead you to this client's *Management Page* (2.3). **Modify** leads to the *Modify Client Page* (2.2.3), **Remove** deletes the client's profile (this button only appears if client has no order/invoice attached to him/her) and the **Transfer to other client** button's function is explained at 2.2.4.

## 2.2.2 Exporting client data

As seen on Fig.2.4, there exists an **Export** button enabling to export search results as a .csv file that can be then downloaded via a mouse right-click. For instance, Fig.2.5 shows how to generate such a file of all of your client database.

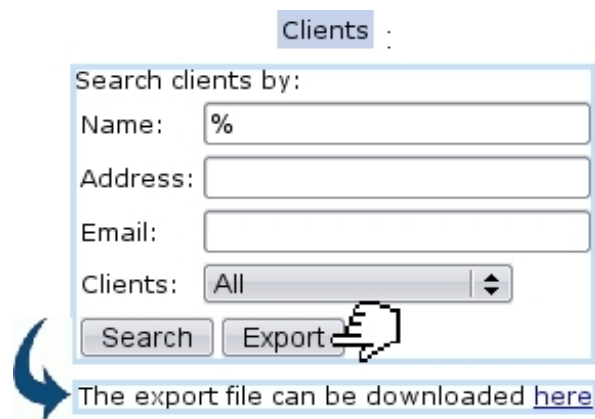


Figure 2.5: Generating an export file for all registered clients (as generated by using % character in the 'Name:' field).

## 2.2.3 Modifying client data

The **Modify** button, available after having done a search in any way described above, leads to the *Modify Client Page*, which features the same data-fill possibilities as seen during the new client's profile creation (2.1).

## 2.2.4 Transferring to another client

Another function of the Client interface is that of transferring a client's whole data to another with the help of the **Transfer to other client** button. This may come in handy for instance when two clients are related and that information has to be transferred from one to the other.

In the example as illustrated in Fig.2.6, client Herbert Mayfield is transferred to other client Herbert Mayfield, Jr.

[Client Search] [Mayfield Herbert](#)

**Transfer client**

**Username:** Mayfield.Herbert  
**Name:** Mayfield Herbert  
**Address:** 32 Sycomore Avenue  
**Zip Code / City:** 98045 North Bend  
**Country:** USA  
**Tel / Office:** 555 1223  
**Mobile / Fax:**  
**E-mail address:**

---

Transfer to one the following clients:

[Mayfield Herbert, Jr](#) Mayfield.HerbertJr

---

Search clients in shop by the following criteria :  
[Client Search Engine]  
...

Transfer client **Mayfield Herbert (Mayfield.Herbert)** to client **Mayfield Herbert, Jr (Mayfield.HerbertJr)**

Keep original client account

Figure 2.6: Transferring a client's data to an other, and keeping original client account.

## 2.3 The *Client Management Page*

The *Client Management Page* as featured in Fig.2.7 stands without any doubt as the most useful and meaningful client page. It indeed lists all the client's general data along with buttons that enable to display information pertaining to payments, invoices, ..., and to thus proceed to various acts.

It is accessed after having clicked on the client's name as available after a client search (2.2.1). Or in other contexts, when a client's name appears in a clickable form, the corresponding *Client Management Page* is what it conveniently leads to.

Apart from the general data related to name, address,... and types (eg. : physical person, private client) the *Client Management Page* also displays her/his payment method (6.4.1), her/his service level agreement (9.5) and credit control class (5.6.6.1). The billing status appears only if it is in any other state than 'Ok' (for instance, 'First reminder' or 'Court' ; see 5.9.1 for further details about billing statuses).

If some subscriptions (3.7) have been created for the client, the current subscription status as well the number of active subscriptions are displayed on the right of the page.

[Client Search] [Smith John](#) :

### Client management

<b>Username:</b>	Smith.John	<b>Subscription status:</b>	activated
<b>Title:</b>	Mr	<b>Active subscriptions:</b>	1
<b>Name:</b>	Smith	<div style="border: 1px solid black; padding: 5px;"><b>Entry contract :</b> EC_Smith, John.pdf ID registered : Yes <a href="#">More...</a></div>	
<b>First name:</b>	John		
<b>Address:</b>	12 Orange Road 90000 Los Angeles USA		
<b>Phone:</b>	555 1234		
<b>Office phone:</b>	555555		
<b>Mobile phone:</b>	6666666		
<b>Fax:</b>	777777		
<b>E-mail:</b>	<a href="mailto:john.smith@mailserv.com">john.smith@mailserv.com</a>		
<b>Payment method:</b>	Pay by credit card		
<b>Billing method:</b>	Send bill by mail		
<b>Registered since:</b>	09/06/2008 (Richard Malone)		
<b>Type of person:</b>	Physical person		
<b>Type of client:</b>	Private client		
<b>Status:</b>	Ok		
<b>Credit control class:</b>	None		
<b>Billing:</b>	First reminder		
<b>SLA:</b>	Normal		

[show all details...](#)

Modify Transfer to other client Offers and orders Subscriptions  
View account Invoices and credit notes Client accountancy Invoice addons  
Monthly invoices Configure reminders  
Domiciliation orders Credit control Cost analysis  
Ticket list Lists Commercial actions Forms  
Appointments Documents Client login

Figure 2.7: The *Client Management Page* for client John Smith.

Also, if some properties (7.6) have been defined, they are displayed within a black frame below that.

At the bottom of the page, a multitude of buttons then give the possibility to check any of the various aspects of the client's state and proceed to various actions :

- Modify leads to the *Modify Client Page* (2.2.3) ;
- Transfer to other client allows to transfer this client to another (2.2.4) ;
- Offers and orders leads to the *Search Orders Page* (4.2), which lists all the orders that this client has done ;

- **Subscriptions** leads to the *View Subscriptions Page (3.7.1.3)* for this client ;
- **View account** leads to this client's *View Client Account Page (5.6.7)* ;
- **Invoices and credit notes** leads to this client's *View Invoices And Credit Notes Page (5.3)* ;
- **Client accountancy** leads to this client's *Client Payments Page (5.6)* ;
- **Invoice addons** leads to this client's *Invoice Addons Page (5.4.5)* ;
- **Monthly invoices** leads to the *Monthly Invoices Page (3.7.2)* ;
- **Configure reminders** leads to the *Configure Reminders Page (5.9.4)* for this client ;
- **Domiciliation orders** leads to this client's *Client Domiciliation Order Page (5.10.1)* if applicable (5.10) ;
- **Credit control** show in a new page the credit control result (5.6.6.1) ;
- **Cost analysis** leads to the *Cost Analysis Page (5.6.10)* for this client ;
- **Ticket list** shows in a pop-up window the list of tickets this client has issued (8) ;
- **Lists** shows in a pop-up window the list of client lists this client belongs to (2.4) ;
- **Commercial actions** shows in a pop-up window the list of Customer Relationship Management actions (7.9.4) ;
- **Forms** shows in a pop-up window the list of available Customer Relationship Management predefined form models (7.9.10) ;
- **Appointments** shows in a pop-up window the list of agenda appointments (7.2.3.1) for this client ;
- **Documents** shows in a pop-up window the list of mail documents (7.7.3) created for this client ;
- **Client login** checks whether login is ok for this client.



Buttons of the bottom row that lead to the display of pop-up windows ( **Ticket list** ,... to **Documents** ) only appear if, on the *Modify User Page* (Fig.9.17) or the *User Right Page* (11.2), at least 'View' rights have been set for the following :

[Custom Script User Rights] **View ticket list**

[User Rights] **Bill set management**

[Menu Script User Rights] **Agenda - Appointment list for one client**

[Menu Script User Rights] **CRM - Commercial actions**

[Menu Script User Rights] **CRM - Forms**

[Menu Script User Rights] **Mail - Mail list for one client**

## 2.4 Client lists

Client lists are meant to gather certain clients according to common features, similarly as for Customer Relationship Manager's contact lists (7.9.3.5).

They are accessed from a client's *Management Page* (2.3), as shown in Fig.2.8.

[Client Management Page for John Smith] **Lists** :

**Lists featuring Smith.John :**

Usergroup :  User :

Title	Description	User	
L.A. Residents	Los Angeles and vicinity	Jack Jones	<input type="button" value="Remove"/>

Figure 2.8: List(s) featuring a particular client.

This pop-up features :

- search criteria aimed at displaying lists created by particular user groups, broken down by user, with several ordering options ;
- the lists this client belongs to, including for each a short description and the possibility to  the client from it ;



- a menu featuring all created lists (according to the user group/user choice above), with possibility for each one to **Add** the client in it ;
- the possibility to add a new client list thanks to the eponymous button (2.4.1).

### 2.4.1 Adding a new client list

Fig.2.9 shows how a new client list is added ; automatic inclusion of client is optional and proposed by default.

[Client List Pop-up for John Smith] **New list** :

Name:

Comment:

**Insert Smith.John**


**Add new list** 

Figure 2.9: Creating a contact list for gathering "VIP" clients.

## 2.5 Marketing campaigns

Blue Chameleon permits to create client-related marketing campaigns, based upon client classifications. Those are built from the clients lists as described above.

The *Marketing Campaign Page* as featured at Fig.2.10 is accessed via **Clients** / **Marketing campaign**.

**Clients** / **Marketing campaign** :

**Marketing campaign**

Classification	Clients
Standard	31

**Change client classification** **Init all clients without a classification** **Reset all**

**Configuration**

Figure 2.10: The *Marketing Campaign Page*.

### 2.5.1 Configuring marketing campaigns

Configuring the marketing tool means adding and managing three kinds of objects :

- advertisements ;
- client classifications ;
- ad spaces.

The page where those objects are configured is accessed via the **Configuration** button as found on the *Marketing Campaign Page*.

### 2.5.1.1 Managing advertisements

[In Development]

### 2.5.1.2 Client classifications

Upon first use of the marketing tool, only one classification exists, 'Standard', in which all existing clients are put by default ; this can be changed by doing a reset (2.5.2.3).

Other classifications (alternatively called 'marketing categories') can be added as shown in Fig.2.11.

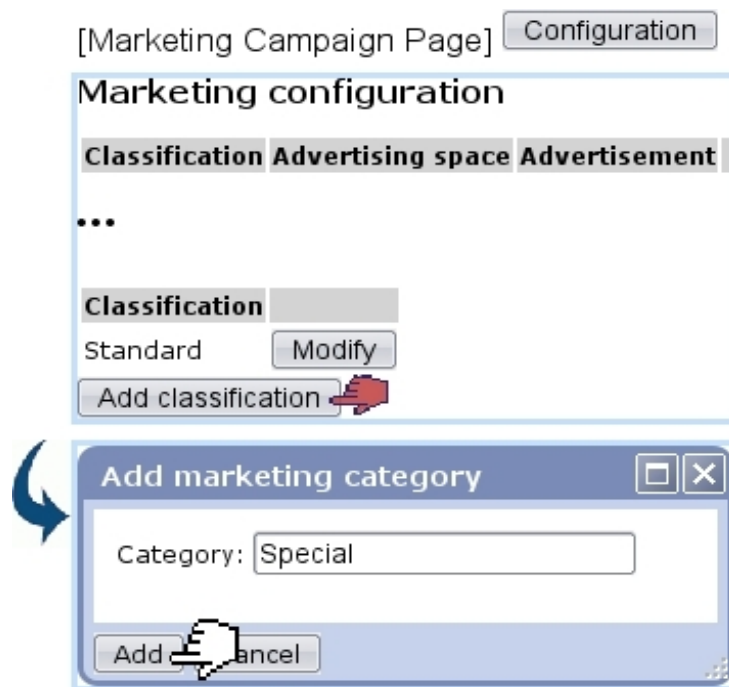
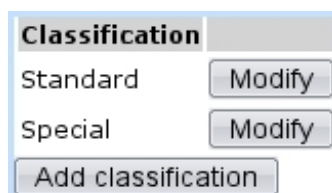


Figure 2.11: Adding the marketing category.

After, these classifications can be modified name-wise with their **Modify** button :



How client classifications are filled is explained at 2.5.2.

### 2.5.1.3 Advertisement spaces

These are defined as featured at Fig.2.12 ; they consist in one name, which can afterwards be modified through the eponymous button.

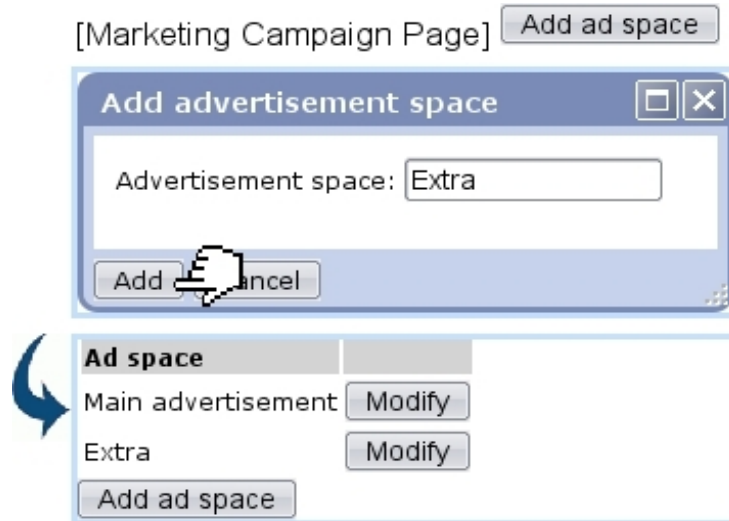


Figure 2.12: Adding an advertisement space.

## 2.5.2 Use of client classifications

Client classifications/marketing categories (2.5.1.2) are filled/managed on the *Marketing Campaign Page*.

### 2.5.2.1 Changing client classification

As featured on Fig.2.13, a client classification can be filled with the clients featured in a client list (2.4).

As a result, the Classification/Clients table as seen on the *Marketing Campaign Page* will now feature explicitly this classification.

### 2.5.2.2 Initializing clients without a classification

It may happen that some clients do not belong to any classification ; to change this, those clients can be assessed any classification :

[Marketing Campaign Page] **Change client classification** :

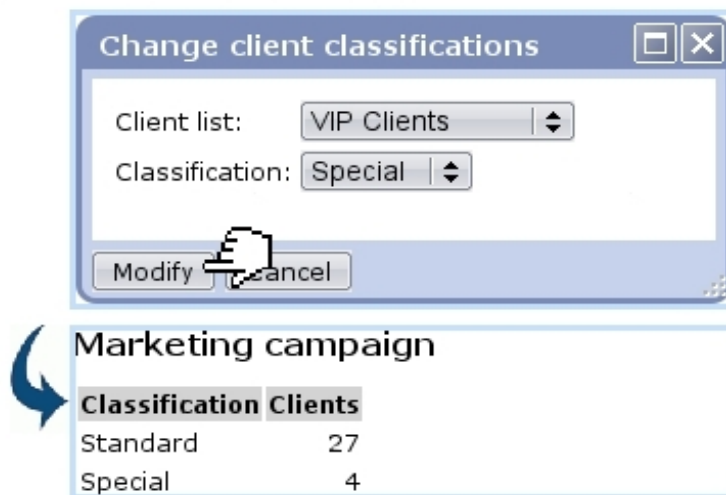
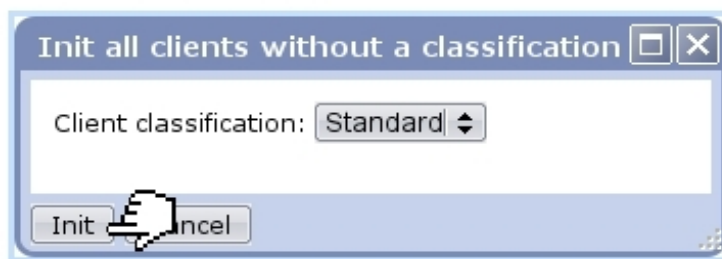


Figure 2.13: Putting the clients in a specific client list in a marketing category.

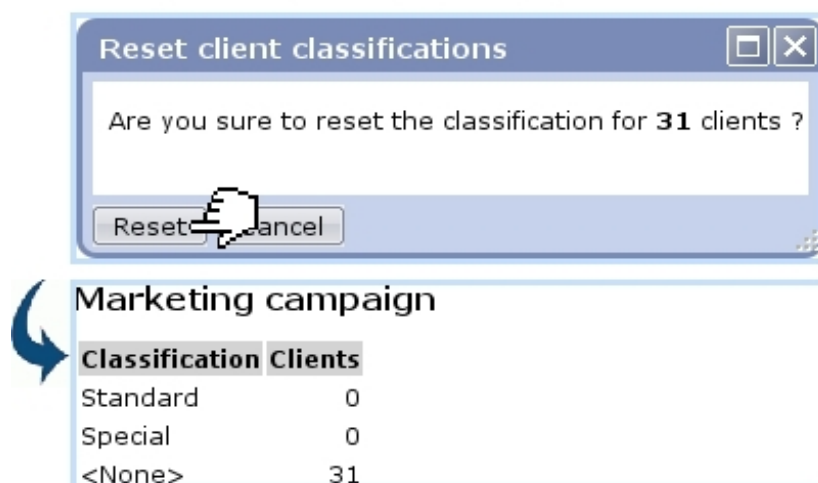
[Marketing Campaign Page] **Init all clients without a classification** :



### 2.5.2.3 Resetting client classifications

Through the eponymous button, the contents of all client classifications are emptied, thus putting clients into a 'None' classification :

[Marketing Campaign Page] **Reset all** :



# Chapter 3

## Article Management

How to easily build your article database - as well as managing your stock - will be cleared up in this Chapter.

All commands explained in the following are accessible from the **Articles** command group.

### 3.1 Basic article management

#### 3.1.1 Building your article database



*User rights for article management (adding, viewing, modifying,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

#### Article management

An 'article', in the following, is any item your company sells (no matter its price or size) and that can be counted individually.

To create a new article, follow **Articles** / **Articles** / **Add new 'TYPE' article**, where 'TYPE' is the type (3.1.2.1) which this new article will belong to (here, "Snacks" ; it is 'default' if no types are created yet, or if you do not wish to create any). This leads to the *Add Article Page*, where, as usual, fill-in fields and drop-down menus are here to make the article's description as exhaustive as possible, as shown on Fig.3.1.

### Add article

Article type:	Snacks
Article name:	Cheddar Crackers Box
Order label:	Cheddar Crackers Box
Category:	Crackers
Parent articles:	None
Parent article category:	<none> Add
Child articles:	None
Unit price:	1.00 USD(VAT incl.)
Tax code:	VAT 6% (6.00 %)
Tax code EU:	Euro-VAT 6% (6.00 %)
Tax code Rest of the world:	World-VAT 6% (6.00 %)
Order article:	Orderable in back- and frontoffice
Edit on order:	Edit article price and label
Status:	Available
Sale status:	New
Usage type:	Normal
Invoices:	Complete invoices for this article <input checked="" type="checkbox"/> Propose for credit notes <input checked="" type="checkbox"/> Use on invoice addons
Depreciation profile:	<None>
Stock article:	Cheddar Crackers Box Add new stock article
Event script:	<None>
External library data:	0
Icon file:	None Add icon
Image file:	Cracker box pic Add image
Supplier:	None
External account:	30001 - Food articles Add new account
External expenses account:	13001 - Food articles expen Add new account
Credit note account:	Credit note - Food articles


Add 

Figure 3.1: Adding the new article *Cheddar Crackers Box*.



**Registering an article requires at least one defined tax code (6.3.2) ; this tax will be 'not included' or 'always included' in the unit price according to the Merchant setting for tax (9.1.5).**

The information that will be given by fill-in fields consist mainly in this new article's name, its unit price and the minimum quantity by which it will be ordered (by default 1).

The first drop-down menus let you choose :

- the article type (3.1.2.1) ;
- the article category (3.1.2.2). If, on the *Merchant Configuration Page* (9.1.4), 'article in multiple categories' has been activated, this menu is replaced by a  button leading to :

#### Modify category list

Every article must have a valid main category (displayed as **bold**), because undefined ones will cause the article to be discarded ! Select a button to modify the category list:

\*\*\* **undefined** \*\*\*

where one has to  the main category (always in bold) and has the possibility to add other ones ;

- a parent article category or none ; also, whether this article has (and in a optional or required way) parent and child articles (3.2.1.7) ;
- for each defined tax category (6.3.1), a tax code (6.3.2).

Other menus deal with various article options, pertaining to :

- statuses (3.3.1.1) ;
- usage (3.3.1.2) ;
- orders (3.3.1.3) ;
- stock (3.3.1.4) ;
- invoicing (3.3.1.5) ;
- accounting (3.3.2).

It is also possible to  or  to this new article, as described at 9.7.2.

Finally, a text description can be added after the article is created (3.2.1.2).

## 3.1.2 Article types and categories



User rights for article type and category management (adding, viewing, modifying,...) can be set up either at the *Modify User Page* (Fig.9.17) or the *User Right Page* (11.2) under the elements

**Article type management**

and

**Category management**

Article types are used to gather several categories, which themselves hold different articles according to common features.

### 3.1.2.1 Adding a new article type

Adding a new article type is achieved via **Article types** / **Add new article type** ; you will have then to fill-in this new type's name into the multi-language fields (appearing languages are set on the *Merchant Configuration Page*, 9.1.9). Finally, click on **Add** to create your new type. The process is displayed on Fig.3.2.

**Article types** / **Add new article type** :

**Add article type**

Image:

Language **English**:  
Type name:

Language **French**:  
Type name:

Language **German**:  
Type name:

Visibility:

Stock support:

Figure 3.2: Adding the new article type "Snacks".

Drop-down menus deal with visibility (3.3.3.1) and stock support (3.3.3.2).

The menu 'Image:' contains all images you have uploaded as article type images : to upload an image for an article type, follow the guideline as explained at 9.7.1.



### 3.1.2.2 Adding a new category

To create a new category, as shown on Fig.3.3, follow **Categories / Add new 'TYPE' category** where 'TYPE' is the article type unto which you wish to create this new category (here, "Snacks" ; or 'default' if no article type has been created yet, or if you do not wish to create any).

**Categories / Add new 'Snacks' category** :

#### Add category

Creating in:	Snacks
Category parent:	<None>   ⚙
Category image:	<None>   ⚙
Hide text in list item:	<input type="checkbox"/>
Hide image in list item:	<input type="checkbox"/>
Hide text in list header:	<input type="checkbox"/>
Hide image in list header:	<input type="checkbox"/>
Article ordering level:	frontoffice and backoffice level 0   ⚙
Article presentation:	single article   ⚙
Article ordering:	add single articles per page to cart   ⚙
Include articles in this category into client confirmation emails:	yes   ⚙
Hide link to view all articles in this category:	<input type="checkbox"/>
Quantity to add to shopping cart:	single occurrence of article with variable quantity   ⚙
Stock support:	required stock delivery   ⚙
Stock category:	<None>   ⚙
Client to invoice ordered articles:	same as order client   ⚙
Default client to receive invoices:	<not specified>
Article order:	Article name ascending   ⚙
Delivery method set:	<None>   ⚙
Payment method set:	<None>   ⚙
Category name...	
...for language <b>English</b> :	Crackers
...for language <b>French</b> :	
...for language <b>German</b> :	


**Add** 

Figure 3.3: Adding the new category 'Crackers'.

On subsequent screen, the new category name has to be filled in, while drop-down menus allow to give information pertaining to :

- orders (3.3.4.2) ;
- stock support (3.3.4.3) ;
- invoicing (3.3.4.4) ;
- display style of related articles (3.3.4.5) ;
- method sets (3.3.4.6).

The menu 'Category image:' contains all images you have uploaded as category images : to upload an image for a category, follow the guideline as explained at 9.7.1.

## 3.2 Articles, categories and types management through time

Blue Chameleon provides extended possibilities for managing everything related to article, categories and types.

### 3.2.1 Managing articles

The *Article Management Page*, as shown in Fig.3.4, allows you to view an article's main details as well as modify it. To get there, in the "Snacks" example used above, the path is :

Articles / Existing 'Snacks' articles / [View Crackers articles](#) / [Cheddar Crackers Box](#) :  
*Cheddar Crackers Box Management Page*

An extended description of the article can be accessed through [View](#) .

Articles / Existing 'Snacks' articles / [View Crackers articles](#) / [Cheddar Crackers Box](#) :

**Cheddar Crackers Box**

<b>Article type:</b>	Snacks	
<b>Category:</b>	Crackers	
<b>Unit price:</b>	1.00 USD	
<b>Usage type:</b>	Normal	
<b>Invoices:</b>	Complete invoices for this article	
<b>Stock article:</b>	Cheddar Crackers Box (9 in stock)	
<b>External account:</b>	<Default>	
<b>Credit note account:</b>	for general Articles	

[View](#)
[Modify general](#)
[Modify description](#)
[Modify links](#)
[Modify files](#)
[Remove](#)

Figure 3.4: The *Article Management Page* for article *Cheddar Crackers Box*.

According to the choices made while at the *Merchant Configuration Page* (9.1.4), several buttons may appear on this page, allowing to create price types for this article (3.2.1.3) and attach files to it (3.2.1.5).

### 3.2.1.1 Modifying articles

On the *Article Management Page* (3.2.1), a **Modify general** button enables you to modify the article's data with the very same options as during its creation. Therefore, you can for instance :

- correct possible mistakes ;
- change the type and/or category the article belongs to ;
- update unit price ;
- modify article's order properties (3.3.1.3) ;
- update current article status (3.3.1.1).

### 3.2.1.2 Article description

The **Modify description** button allows to add a text description to the article, or modify said description afterwards. Fig.3.5 below shows an example.



Figure 3.5: Adding/modifying an article's description.

### 3.2.1.3 Special prices

If 'Article price types' is enabled on the *Merchant Configuration Page* (9.1.4), the *Article Management Page* provides a **Modify special prices** button which enables to create for this article several prices that may be used in various conditions.

### 3.2.1.4 Article links

If needed, an Internet address (for instance linking to this article's page on your website) can be associated with an article ; this is done from the *Article Management Page* via **Modify links**.

### 3.2.1.5 Article files

If 'Article file management' is enabled on the *Merchant Configuration Page* (9.1.4), the *Article Management Page* provides a **Modify files** button which enables to attach files to this article.

**3.2.1.5.1 Adding an article file** Fig.3.6 shows how a file can be attached to an article.

[Article Management Page] **Modify files** / **Add new file** :

#### Add article file

You must specify a title for each file or it won't be registered.

Article: Cheddar Crackers Box

Language **English**:

File:  **Add file**

Title:

Text:

...

**Submit**

#### Upload article file

File type:

File:  **Browse...**

Description:

**Submit**

#### Modify article file

You must specify a title for each file or it won't be registered.

Article: Cheddar Crackers Box

Language **English**:

File:  **Add file**

Title:

Text:

...

**Submit**

Figure 3.6: Attaching a file to a particular article.

There, for each language supported in the shop (*Merchant Configuration Page*, 9.1.9), a **Add file** button allows to upload a file (which type is given) ; this must be for at least

one language.

For any given article, several files can be uploaded.

**3.2.1.5.2 Opening article files** Once uploaded, article files can be opened or downloaded (as well as modified or removed) in the way show at Fig.3.7.



Figure 3.7: Getting to a previously-uploaded article file.

### 3.2.1.6 Looking for articles

As your article database grows, it may become sometimes necessary to look for specific articles according to various criteria. As illustrated on Fig.3.8, this purpose is fulfilled by the page as accessed through **Search article**, a button found at the bottom of the **Articles** / **Articles** page.



Figure 3.8: Looking for articles.

Search criteria include :

- the article name, or a part thereof ;
- the article type ;
- the category ;
- the usage type (3.3.1.2) ;
- a code (3.6.1.4) (or a part thereof) related to a stock article (3.6.1.4) that had been attached (3.10) to the aimed article ;
- the article status (3.3.1.1) ;
- the related external account (3.3.2) ;

### 3.2.1.7 Parent and child articles

[In Development]

## 3.2.2 Managing categories and types

Categories and types can be viewed through the following paths, respectively :

**Categories** / **Existing 'Snacks' categories** / [Crackers](#) : *'Crackers' View Category Page*

and

**Article types** / [Snacks](#) : *"Snacks" View Article Type Page*

### 3.2.2.1 Modifying categories and types

The modifying and deleting of these is provided by **Modify** and **Remove** buttons, which are both available through the following paths, respectively for categories and types :

**Categories** / **Existing 'Snacks' categories** / **Modify**, **Remove**

and

**Article types** / **Modify**, **Remove**

## 3.3 Options for articles, article types and categories

In the following, the contents of the various menus as seen during article, article type and category creation will be cleared up.

### 3.3.1 Options for articles

They can be assessed or modified when creating (3.1.1) or modifying (3.2.1.1) an article.

#### 3.3.1.1 Article statuses

Supported article statuses are set on the *Merchant Configuration Page* (9.1.4). There, you can choose to which statuses will be supported in the Articles environment : available, unavailable, hidden, available with quantity indication, available with quantity limitation, ordered and unavailable online.

It is to note that these article statuses are assessed willingly while at the *Modify General Page* (3.2.1.1) so as to give to *a particular article* availability and appearance properties independently of the article type they belong to.

- available : the default status for an article, that is to be seen in any context ;
- unavailable : this article will appear in the Orders context, but will be flagged as 'unavailable' and thus it will not be possible to order it. It can be used for instance for an article that is only temporarily unavailable and has to appear as so as a reminder ;
- unavailable online : same as above ;
- hidden : this article will not appear in the Orders context. The main difference with the 'unavailable' status is that here, we *do not* want this article to be ordered. In general, setting 'hidden' for the visibility of the Article Type (3.3.3.1) they belong to is the way to hide an article in the Orders context. But, inside an article type, if *some articles are to be hidden and others not*, this article status 'hidden' allows to hide those without affecting the others ;
- available with quantity indication ;
- available with quantity limitation ;
- ordered.

**3.3.1.1.1 Sale status** This menu as found below the article 'Status:' serves to define better an article, sales-wise. Statuses are :

- normal
- new (the default sale status as a new article is created)
- offer

- discontinued

Choosing 'new', 'offer' or 'discontinued' will make appear, on the Order context, this sale status blinking red right to the articles's name.

### 3.3.1.2 Article usage

The menu 'Usage type:' while creating a new article (3.1.1) serves to decide how this article is to be used as :

- Normal : this is the most common option, article is tangible ;
- Subscription (3.7), Subscription with variable consumption or Variable consumption only (3.7.4) ;
- Prepayment ;
- Article bundle (3.4).

While 'Normal' is always here by default, the other choices can be enabled/disabled on the *Merchant Configuration Page* (9.1.4).

It is to note that, once chosen, an article usage cannot be modified afterwards.

### 3.3.1.3 Ordering options for articles

Several options are available, taking effect in the context of making orders (4.1) :

- the 'Order label:' field lets you enter a specific name by which this article will be referred to as in that context ;
- if enabled while at the *Merchant Configuration Page* (9.1.5), a 'Order quantity unit:' field appears, imposing how many copies of this article have to be ordered at a time ;
- an 'Order article:' drop-down menu decides whether this article is to be ordered ('Not Orderable' states that it will not) and if yes, at which level : only in back-office for articles that will not be ordered from the outside (i.e. only by Blue Chameleon users), or on both back- and front-office for articles that will be ordered by both clients and Blue Chameleon users ;
- the 'Edit on order:' menu lets you decide, while during the ordering process, which things can be edited : the article label only, the article label and its price, or neither. This is useful to either protect a specific article from any editing, or at the contrary enable unforeseen changes ;
- the 'Sales status:' menu : if 'Normal' is not chosen here, one of the selected descriptors 'New', 'Offer', 'Discontinued' will appear blinking next to article name when selecting articles for an order.



### 3.3.1.4 Stock options for articles

Several menus allows to define stock-related data pertaining to articles ; they only appear if the relevant setting, on the *Merchant Configuration Page* (9.1.4), has been enabled :

- the 'Supplier:' menu allows to define a default supplier (3.6.1.2) for this article (only appears if 'Supplier management' is set to anything else than 'disabled') ;
- the 'Depreciation:' menu allows to choose a depreciation profile (3.6.2) for the relevant stock article (only appears if 'Depreciation' has been enabled) ;
- the 'Stock article' menu (which appears only if the category as chosen above is stock-supported, 3.3.4.3) allows to :
  - either pick from a menu a previously-defined stock article (3.6.1.4) to be linked to this article (appears if 'Stock management' is set to 'Physical stock management') ;
  - or enter in a field a stock quantity (appears if 'Stock management' is set to 'Stock management by counters').

### 3.3.1.5 Invoicing options for articles

While creating an article, a defined tax code (6.3.2) has to be assessed to it ; whether it is included in the unit price or not is set at the *Merchant Configuration Page* (9.1.5). The 'Invoices:' menu leaves the choice between 'No invoices' (disabling the invoicing of this article), 'Complete invoices' (which is the default mode) and 'Invoices for consumption only' (if article is a subscription with consumption, see 3.7.4).

The checkboxes "Propose for credit notes" and "Use for invoice addons" respectively decide whether this article will could be used when registering credit notes (5.7) or creating an invoice addon (5.4.5.1).

## 3.3.2 General accounting options for articles

In order to later handle Blue Chameleon's accounting functions (6), it is necessary to assign to an article default or specific 'article' and 'article expenses' external accounts (6.1.1) and a credit note account (6.2.2).

Of course, should it be needed, the external/credit note accounts can be redefined anytime through article modifying (3.2.1.1).

## 3.3.3 Options for article types

They can be assessed or modified when creating (3.1.2.1) or modifying (3.2.2.1) an article type.

### 3.3.3.1 Article type visibility

While creating an article type, a Visibility drop-down menu lets you pick between :

- visible : this is the default choice, and it will render this article type visible in any context ;
- visible on demand : article type will be visible in the **Articles** environment, but, at the *Make Order Page* (4.1), one will have to click on the type name to display its categories ;
- hidden : article type will be visible in the **Articles** environment, but will not appear at all at the page accessed via the *Make Order Page* ; this choice is the one to pick in order to prevent articles belonging to this type from being ordered at all.

On the *Merchant Configuration Page* (9.1.4), if 'Hide article types' is chosen, *all* articles types will have the 'hidden' behavior, whatever their individual visibilities are.

### 3.3.3.2 Stock support options for article types

The 'Stock support:' menu only appears if 'Stock management', on the *Merchant Configuration Page* (9.1.4) is set to anything else than disabled. This menu gives four options :

- no support : related articles will not be supported by stock system ;
- stock counter : related articles will be supported by stock system except for delivery/entry : this is for items that do not have serial numbers ;
- optional stock delivery : related articles will be able to be managed delivery/entry-wise. This is for articles that have serial numbers which are not known ;
- required stock delivery : related articles, which possess known serial numbers, will be mandatorily managed through the delivery/entry system.

It is to note that the latter two options only appear if the setting for 'Stock management' is 'Physical stock management'.

### 3.3.4 Options for categories

They can be assessed or modified when creating (3.1.2.2) or modifying (3.2.2.1) a category.

#### 3.3.4.1 Creating subcategories and more

Once at least one category has been created inside an article type, it is possible to be more accurate in an article's classification, by creating subcategories and even more further.

For instance, for a "Drinks" article type containing the 'Corn Syrup-Based Colas', 'Sugar-Free Colas' and 'Fruit Juices' categories, one can define a new 'Fruit Juices / Orange Juice' category with the help of the Category Parent drop-down menu, as shown on

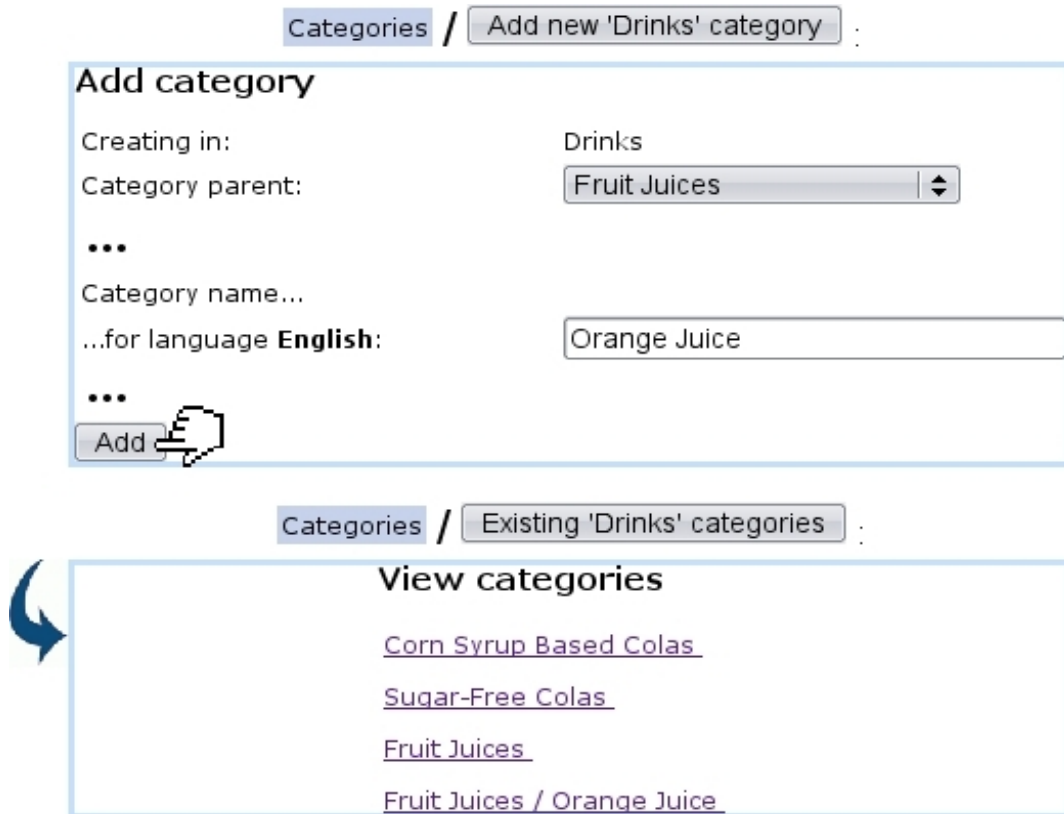


Figure 3.9: Creating another level of classification.

Fig.3.9.

This option avoids the hassle of typing 'Fruit Juices / Orange Juice' inside the name field and shows clearly what this new category (which will be treated as any other category anyway) belongs to.

Now, articles can be added unto this new category as well as new sub-sub-(...)-categories, for example 'Fruit Juices / Orange Juice / Made From Concentrate' and 'Fruit Juices / Orange Juice / 100% Pure'. This system ensures that item classification is as accurate as it can be.

### 3.3.4.2 Ordering options for categories

Those are mainly pertaining to quantitative issues.

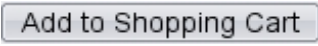
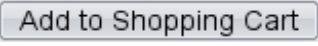
**3.3.4.2.1 Article ordering level** Category creation includes an 'Article ordering level:' menu that includes 'Front-office and back-office level 0', as well as different levels of back-office.

Its aim is to assign to the articles related to this category the possibility to be ordered or not, according to the rights that the user has been given. Indeed, on the *Modify User Page* (Fig.9.17), there is an identical 'Article ordering level:' menu. For instance :

- An article belonging to a category which ordering level is set to 'Front-office and back-office level 0' will be ordered by any user, whatever her/his right is, as this value is the lowest ;
- An article belonging to a category which ordering level is set to 'Backoffice level 2' will be able to ordered only by users who have 'Backoffice level 2' or more (3, 4, Unrestricted) ;
- Articles belonging to a category which ordering level is set as the highest ('Backoffice level 4') will be able to be ordered only by users who have 'Backoffice level 4' (or Unrestricted).

If a user has insufficient rights for a category, on the *Add Order Page* (Fig.4.1), this category will simply be hidden from her/him.

**3.3.4.2.2 Cart options** An 'Article ordering:' menu at the category page decides in which way the related articles will be ordered (4.1.1) :

- without cart : an order made on an article belonging to this category will not contain any other article, as the only available option after having chosen the quantity is to create the order : adding another article is not possible ;
- add single articles per page to cart : if the 'Article presentation:' menu (3.3.4.5.1) is set to either 'all articles detailed' or '...condensed', an  button is available for each article, ensuring that one single article is chosen on this page ;
- add multiple articles per page to cart : this option is only applicable if the 'Article presentation:' menu is set to either 'all articles detailed' or '...condensed'. Then, an  button is available at the bottom of the page, enabling to choose one or several articles on the same page.

**3.3.4.2.3 Ordering quantities** The quantity by which the related article will be ordered and the way it will appear on the order page are set up by the 'Quantity to add to shopping cart:' menu :

- single occurrence of article with a quantity of 1 : related article will be ordered only in unity (by ticking a checkbox), and when it is added to cart, choosing the same article again is not possible ;
- single occurrence of article with a variable quantity : any quantity of this related article can be chosen ; when added to cart, it is possible to choose this article again, also in any quantity. All quantities will add, so that the order page contains one line for this article ;
- multiple occurrences of article with a quantity of 1 : related article will be ordered only in unity (by ticking a checkbox), and when added to cart, choosing the same article again is possible ; the order page will then contain one line for each time this article has been picked.

### 3.3.4.3 Stock support options for categories

While creating or modifying a category, the 'Stock support:' menu gives the same options as for article types (3.3.3.2), with the same conditions of appearance and contents. It is to note that, ultimately, the choice of the **category's** stock support option rules if articles belonging to it will be stock-supported.

As pictured in Fig.3.10, in this case, a menu will appear at the *Add (3.1.1)/Modify (3.2.1.1) Article Pages*, enabling to associate this article with a stock article (3.6.1.4).

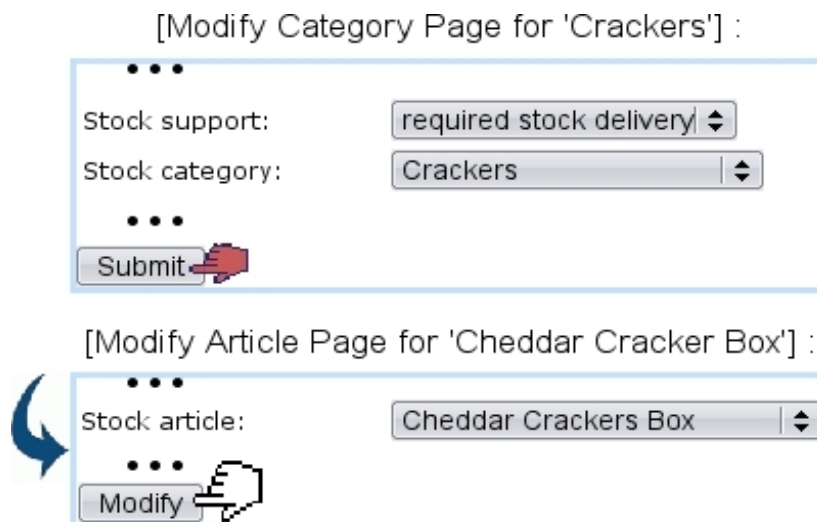


Figure 3.10: Once a category enables stock support, the articles that depend from it provide a menu where they can be associated with a stock article.

For the 'Stock article:' menu as seen on the *Modify Article Page* to appear, it is enough to set the 'Stock support:' menu of the related category's *Modify Page* to 'stock counter'.

Finally, if stock categories are defined (3.6.1.3), a stock category can be assessed to the created category.

### 3.3.4.4 Invoicing options for categories

The 'Client to invoice ordered articles:' menu rules whether articles belonging to this category may be invoiced to an other client than the ordering one. Also, another possibility is to enforce the invoicing to another client.

### 3.3.4.5 Display options for categories' related articles

Those options aim at making the listing of articles easier while ordering.

**3.3.4.5.1 Article presentation** The 'Article presentation:' menu rules how articles will be presented when making an order :

- single article : to choose this article while making an order, clicking on the related category will display all articles therein along with their price, and the aimed article will finally have to be clicked on to be accessed. This is what is shown on Fig.4.1 ;
- all articles condensed : same as above, except that articles as displayed when clicking on category can be picked up directly and individually, in the ways as defined for the 'Article ordering:' (3.3.4.2.2) and 'Quantity to add to shopping cart:' menus (3.3.4.2.3) ;
- all articles detailed : same as for 'all articles condensed', except article statuses (3.3.1.1) and icons (if any, 9.7.2) are displayed too.

**3.3.4.5.2 Article order** The 'Article order:' menu rules how articles belonging to that category will be sorted whenever a list of them is displayed (e.g. while making an order, Fig.4.1). They can be sorted (either in an descending or ascending way) by :

- name ;
- price ;
- ID, which is assessed to a newly created article : choosing this option will then sort the articles according to their creation date.

By default, this menu is set to <Default merchant order> ; this 'merchant order' is set at the *Merchant Configuration Page* (9.1.4).

### **3.3.4.6 Method set options for categories**

A category can be assessed a default delivery method set (4.5.2) and a default payment method set (6.4.2) in order to quicken the order process of the articles belonging to it.

### 3.4 Article bundles

When creating an article, an 'Usage type:' (3.3.1.2) option (if activated on the *Merchant Configuration Page*, 9.1.4) is article bundle : such an article will gather other already-created articles, as Fig.3.11 shows.

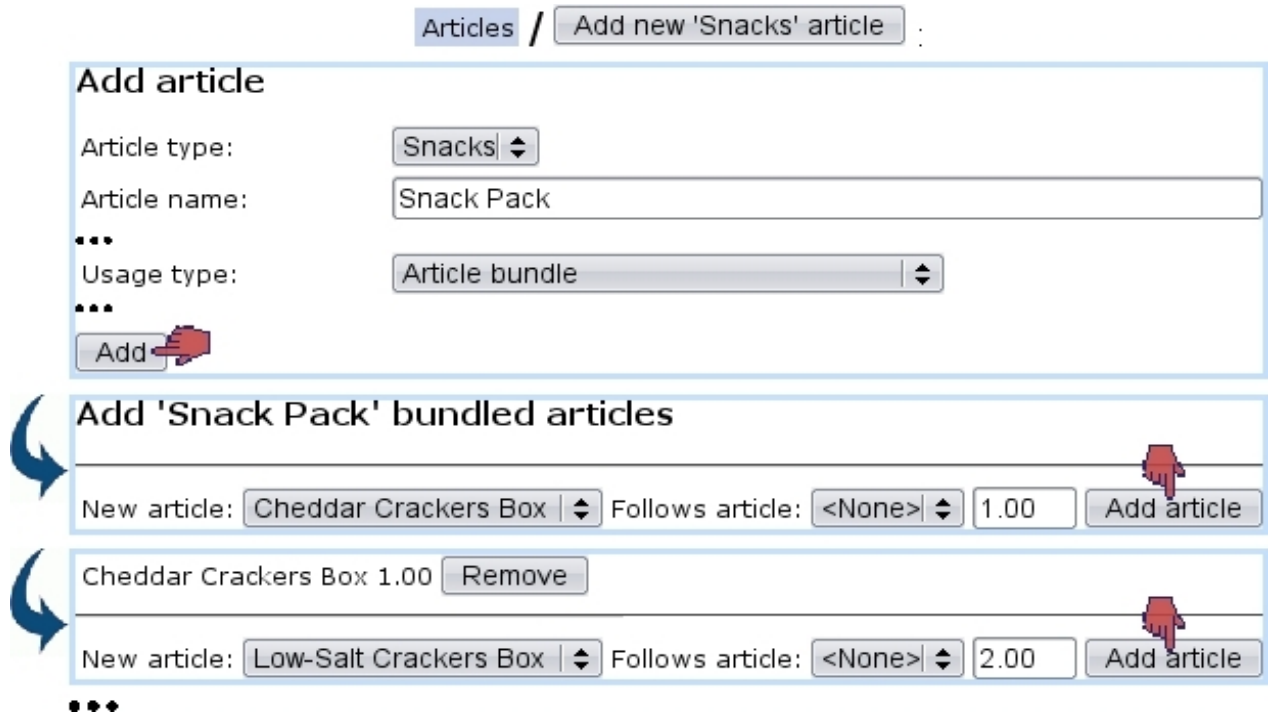


Figure 3.11: Creating an 'article bundle' : various articles are picked and gathered.

Once created, this article bundle can be modified through its *Article Management Page* (3.2.1) in any way as for normal articles, with , as featured in Fig.3.12, the existence of a **Modify bundle** button enabling to remove/add articles from/to the package.

[Article Management Page for "Snack Pack"] :

**Snack Pack**

**Article type:** Snacks      Low-Salt Crackers Box      2.00  
**Category:** Crackers      Tomato-Flavored Crackers Box      0.80  
**Bundle price:** 3.80 USD      Cheddar Crackers Box      1.00  
**Usage type:** Article bundle

**Modify 'Snack Pack' bundled articles**

Low-Salt Crackers Box      2.00        
Tomato-Flavored Crackers Box      0.80        
Cheddar Crackers Box      1.00     

New article:   Follows article:

Figure 3.12: An article bundle can be checked and edited anytime, content-wise.

## 3.5 Further into article configuration

What follows shows how objects named 'keys' and 'indexes' can be used for articles.

### 3.5.1 Indexes



*User rights for index management can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

#### **Index management**

[In Development]

### 3.5.2 Keys



*User rights for key handling can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

#### **Key management**

[In Development]



Articles / Configuration / Variable detail keys / Add new key :

### Add var detail key

Key type:

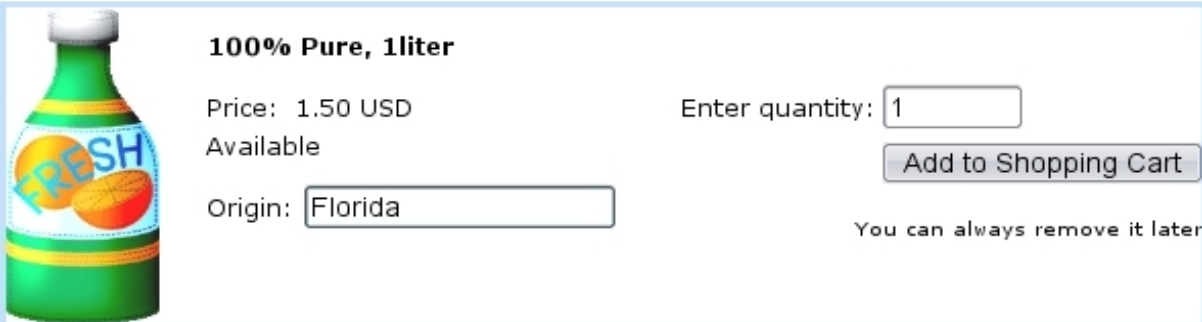
Article type:

Language **English**:

Key name:

...

[Make Order Page for "Drinks/Fruit Juices/Orange Juice/100% Pure, 1 liter"]



**100% Pure, 1liter**

Price: 1.50 USD      Enter quantity:

Available     

Origin:

You can always remove it later

Figure 3.13: Adding a variable detail key that will be used afterwards to fill in an article's origin while ordering.

### 3.5.2.1 Search keys

[In Development]

### 3.5.2.2 Detail keys

[In Development]

### 3.5.2.3 Variable detail keys

Variable detail keys are a way to add to an article a further precision when it is ordered (4.1.1). For instance, as shown in Fig.3.5.2.3, a variable detail key called 'Origin' is given to the article type "Drinks".

## 3.6 Stock management



User rights for general stock management (locations, articles, entries,...) can be set up either at the *Modify User Page* (Fig.9.17) or the *User Right Page* (11.2) under the element

### Stock management

As the entity that unmistakably permits you to never let down your clients in their - sometimes unexpected - needs, your stock should be granted the greatest care. Blue Chameleon has made it easy and reliable to manage your stock in a matter of a few mouse clicks.

Blue Chameleon stock features are mainly accessible from the *Stock Management Page* (Fig.3.14), via **Articles** / **Stock**.

Most of the functions explained below need 'Physical stock management' to be picked in the 'Stock Management:' menu from the *Merchant Configuration Page* (9.1.4).



Figure 3.14: The *Stock Management Page*, with buttons designed to accomplish any stock-related action.

### 3.6.1 Basic creating of stock database

#### 3.6.1.1 Creating stock locations

At least one stock location has to be defined for stock articles to be fully registered. To do so, follow **Stock** / **Stock locations** / **Add stock location** ; on subsequent page, as shown in Fig.3.15, fill in this new location's name and also, if needed, tick corresponding boxes to hide this new location and/or define it as external (locations are defined as internal by default) ; a reseller (9.3) can also be picked.

Stock locations can be viewed, and if necessary, modified or removed.

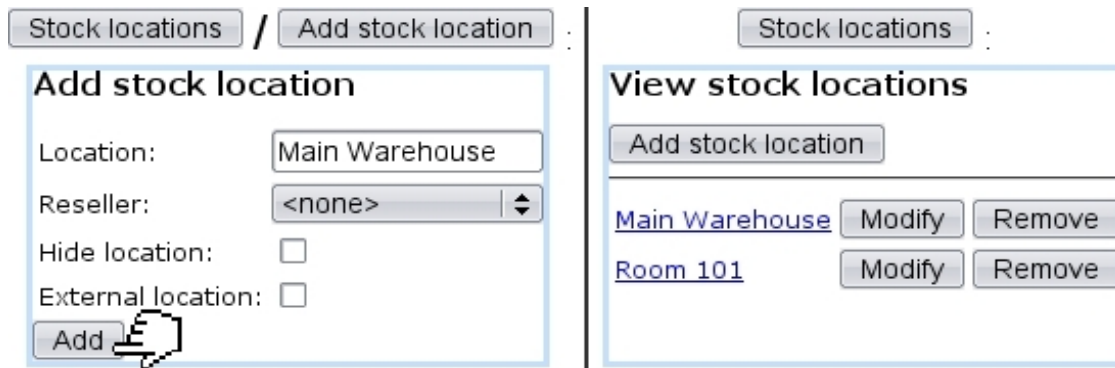



Figure 3.15: Creating and viewing stock locations.

### 3.6.1.2 Creating and managing suppliers



*User rights for generally managing suppliers can be set up either at the [Modify User Page \(Fig.9.17\)](#) or the [User Right Page \(11.2\)](#) under the element*

**Supplier management**

Defining suppliers is not mandatory inside Blue Chameleon. If you want Blue Chameleon to handle them, be sure to enable suppliers while at the *Merchant Configuration Page (9.1.4)* by setting 'Supplier management' to anything else than 'disabled'.

Suppliers are then created through *Suppliers Management Page*, which is accessed differently, via **General** / **Merchant** / **Suppliers**. There, as displayed on Fig.3.16, creating a new supplier is easily achieved.

After their creation, on the *Suppliers Management Page (Fig.3.17)*, suppliers' data can be viewed by clicking on the corresponding supplier ; this data can be updated thanks to the **Modify** button, leading to a similar screen than the one used during suppliers' adding. Also, should a supplier's items not be sold anymore, this supplier can be deleted with **Remove**.

### 3.6.1.3 Creating and managing stock categories

The category/article system as defined above and the stock category/article system are two different entities and therefore stock categories and stock articles should be now defined on their own through **Stock** / **Stock categories** / **Add stock category**.

A stock category is associated with default or specific 'stock article' and 'pending stock article' external accounts (6.1.1).

General / Merchant / **Suppliers** / Add new supplier

### Add supplier

Company name \*:

Contact person:

Address line 1 \*:

Address line 2:

Address line 3:

Zip code \* / City \*:

Country \*:

VAT #:

Tel. \* / Fax:

E-mail address:



(\*) required

Figure 3.16: Adding a supplier.

Suppliers /

 [Food Corps, Ltd](#)

### View supplier

**Company name:** Food Corps, Ltd  
**Contact person:** Harland Sanders  
**Address:** 1 Apple Street  
**Postal code:** 90000      **City:** Los Angeles  
**Country:** USA  
**VAT #:** VAT 123456  
**Tel:** +555 6789      **Fax:**  
**E-mail address:** [deliveries@foodcorps.ltd](mailto:deliveries@foodcorps.ltd)

Figure 3.17: The *Suppliers Management Page*, showing possibility to view a supplier's details as well as managing it.

Stock categories / Add stock category :

---

**Add stock category**

Category parent: <None>

Category name:

Default external account: < Default >

Default external pending account: < Default >

---

**Add stock category**

Category parent: Chips

Category name:

Default external account: < Default >

Default external pending account: < Default >

Figure 3.18: (*Top* :) Creating a new stock category ; (*Bottom* :) Creating a new stock subcategory, from an already-defined stock category.

Once a stock category is defined, it is possible to create a subcategory inside it : for instance, once the stock category 'Chips' is created, a subcategory 'Chips / Low-Fat Chips' can be defined thanks to the 'Category parent:' drop-down menu. Both of these stock category creations are shown on Fig.3.18.

Stock categories will then lead to what is displayed at Fig.3.19 ; while all stock categories can be modified, only those who are empty (that is to say, containing no subcategories and no stock articles) can be deleted.

#### 3.6.1.4 Creating and managing stock articles

Creating stock articles is achieved via Stock articles / Add stock article ; as shows Fig.3.20, this leads to a page where the following information is filled in :

- a name of this new stock article (here, for instance, *Cheddar Crackers Box*) ;
- a code , which is a short handle that can be used in certain contexts, such as article search (3.2.1.6) and article selection for a shop sale (4.6.1) ;
- the stock category (3.6.1.3) it belongs to ('Crackers') ;
- the status for this stock article , either 'Available' or 'Hidden' ;
- a minimum count for warnings : if the current quantity of stock items for this article is inferior to this number, it will be displayed in red on the *Stock Summary Page* (3.6.5.1) ;

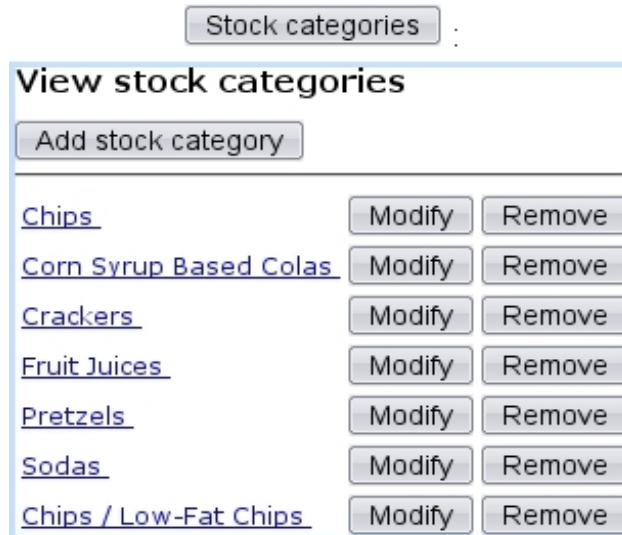


Figure 3.19: Displaying current stock categories.

- associated default or specific 'stock article' and 'pending stock article' external accounts (6.1.1) ; if a stock category was chosen above, these menus are automatically set to the accounts as previously chosen for the stock category, but they can be modified ;
- one or more supplier(s) and the purchase price(s) (3.6.1.2), if supported.

Stock articles / Add stock article :

**Add stock article**

Article:

Code:

Category:

Status:

Minimum count for warnings:

External account:

External pending account:

Supplier	Purchase price	Link to supplier article	
<input style="border: 1px solid gray;" type="text" value="Food Corps, Ltd"/>	<input style="border: 1px solid gray;" type="text" value="0.75"/>	<input style="border: 1px solid gray;" type="text"/>	<input type="button" value="Add supplier"/>

Figure 3.20: Creating a new stock article.

Finally, **Stock articles** enables to view, modify or delete stock articles according to the following example path :

Clicking on the last link leads to the *View Stock Article Page*, as shown at Fig.3.21. If this stock article has been connected to an article (3.10), a link to the latter will be available under **Article references**:

**Cheddar Crackers Box** :

**View stock article**

**Article:** Cheddar Crackers Box

**Code:** CCB

**Category:** Crackers

**Status:** available

**Minimum count before warnings:** 5

**External account:** <Default>

**External pending account:** <Default>

**Supplier(s) and purchase price(s):**  
 Food Corps, Ltd 0.75 [Supplier link](#)

**Article references:**

Article	Category
<a href="#">Cheddar Crackers Box</a>	Crackers

Figure 3.21: The *View Stock Article Page*.

### 3.6.2 Stock article depreciation

For depreciation to be generally managed, it must be enabled while at the *Merchant Configuration Page* (9.1.4).

### 3.6.3 Stock entries


 *Registering a stock entry requires at least one defined stock location (3.6.1.1).*

Now that stock categories and stock articles have been defined, it is now time to see how to input *real* articles, that is to say how to greet the arrival of physical stock items. This task is accomplished thanks to the [Stock entry](#) button.

#### 3.6.3.1 With a supplier document

If you wish to greet a stock entry with a supplier document, be sure that you have defined at least one supplier (3.6.1.2) ; the choice for 'Supplier management' as chosen at the *Merchant Configuration Page* (9.1.4) can then either be 'with optional documents'

or 'with required documents'. The guideline below, summed up at Fig.3.23, is then to follow :

 **Registering a stock entry (with a supplier document)**

1. if no supplier document was created or if you wish to create a new one, click on **New document...** ; else, pick an already existing supplier document in the list ;
2. next, as displayed in Fig.3.22, pick a supplier, fill in a reference, a description, a comment and the document date (as default set as the current date) ;
3. click on the stock category pertaining to this stock entry ; then, choose the stock article itself and the stock location (3.6.1.1) ;
4. Finally, last screen lets you enter the serial numbers on this delivery, each added via the eponymous button ; once every item has been inputted, **Validate** will definitely put this entry into the database.

**Stock entry / New document :**

**Add new supplier document**

Supplier:

Reference:

Description:

Comment:

Document date:  -  -

Figure 3.22: Creating a supplier document.

Number of stock items successfully entered into stock is shown, as displays Fig.3.24.

Once a stock entry has been inputted, it is possible to **Continue with this document**, in case this very supplier document contained also one or more other articles, no matter belonging to the same category or not. If everything on the supplier document was dutifully declared, it is time to **Close supplier document**.

### 3.6.3.2 Without a supplier document

To greet stock entries without using a supplier document, the 'Supplier management' menu at the *Merchant Configuration Page* (9.1.4) must be set to either 'disabled' or 'with optional documents'. Simply pick <without document> in the 'Document:' menu ;



Stock entry / New document / Add :

**Stock entry**

Supplier document: **REFC9876** from 27/5/2010 Close supplier document

[<none>](#)

[Chips](#)

[Low-Fat Chips](#)

[Corn Syrup Based Colas](#)

[Crackers](#)

[Fruit Juices](#)

[Pretzels](#)

[Sodas](#)

**Stock entry**

Supplier document: **REFC9876** from 27/5/2010 Close supplier document

Stock article: Cheddar Crackers Box ▾

Location: Main Warehouse ▾

Use barcode reader

Select

Add serial numbers into stock

Box 1 Remove

Add

Validate Cancel

•••

Figure 3.23: The whole process to greet a stock entry for article *Cheddar Crackers Box*.

the process then remains similar. If, on the other hand, you disabled suppliers, the process to greet a stock entry is simpler and shown at Fig.3.25.

### 3.6.3.3 Managing supplier documents



*User rights for generally managing supplier documents (creation, closing, re-opening,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

**Supplier document access rights**

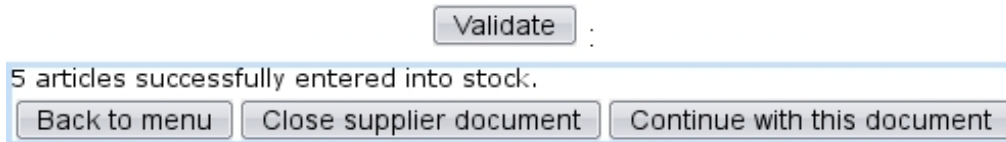


Figure 3.24: The conclusion screen after having successfully created a new stock entry.

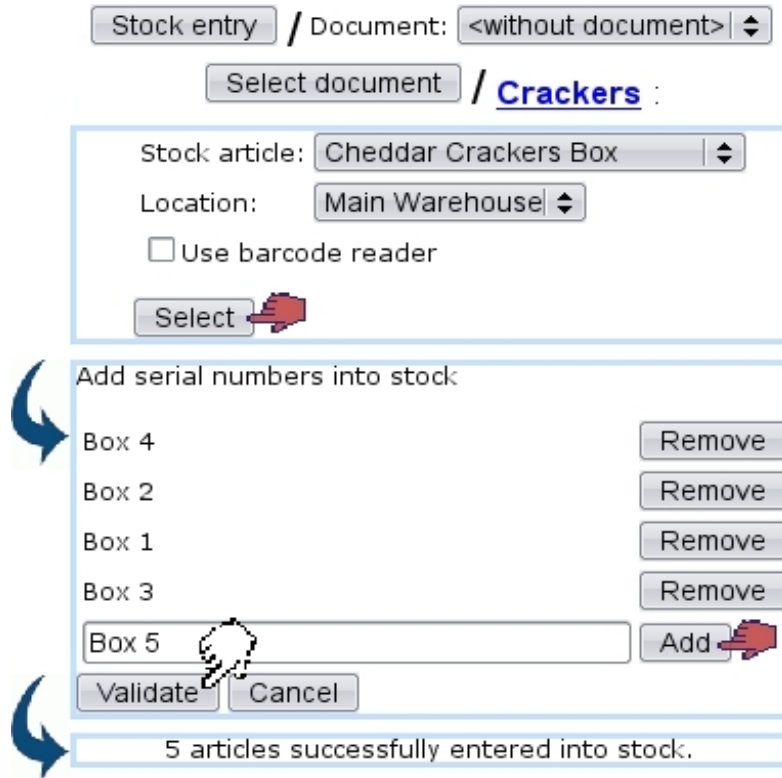


Figure 3.25: The whole process to greet a stock entry for article *Cheddar Crackers Box*, with suppliers 'disabled'.

Supplier documents that have been used, along with their statuses and the possibility to view, modify or close them, can be accessed simply via **Stock / Supplier documents**, as pictured in Fig.3.26.

Searches for supplier documents can be performed on all or one specific supplier(s), as well as on opened or closed documents or all of them.

**3.6.3.3.1 Updating a supplier document** Fig.3.27 shows that, through **Modify**, the following is allowed :

- modifying the document's reference, description, date and related supplier ;
- viewing, if they exist, the related items, with their serial number and location, and, if applicable, which client they have been supplied to and for which order ;
- for those items, removing them from the document ;

Supplier documents :

### View supplier documents

Supplier:

Date	Supplier	Reference	Number	Status	
14/2/2011	Food Corps, Ltd	<a href="#">REFC9900</a>	9	opened	<input type="button" value="Close document"/> <input type="button" value="Modify"/>
27/5/2010	Food Corps, Ltd	<a href="#">REFC9876</a>	3	opened	<input type="button" value="Close document"/> <input type="button" value="Modify"/>
8/10/2009	Food Corps, Ltd	<a href="#">NWDC1234</a>	2	opened	<input type="button" value="Close document"/> <input type="button" value="Modify"/>

Figure 3.26: This page allows to view and manage supplier documents.

- via  , attaching to this document items that had been entered without a document (3.6.3.2).

Supplier documents / [REFC9876](#)

### Modify supplier document

Document number: 3

Reference:

Document date:  -  -

Supplier:

Description:

Status: opened

	Serial number	Stock entry	Location	Status	Purchase price	Current value	Client	Order
<input type="checkbox"/>	<a href="#">5</a>	<b>Cheddar Crackers Box</b>				<input type="text" value=""/>		
<input type="checkbox"/>	<a href="#">Box 2</a>	27/5/2010	Main Warehouse	sold	0.75	<input type="text" value="0.75"/>	<a href="#">Smith John (Smith.John)</a>	<a href="#">2010052901001</a>
<input type="checkbox"/>	<a href="#">Box 3</a>	27/5/2010	Main Warehouse	sold	0.75	<input type="text" value="0.75"/>	<a href="#">Smith John (Smith.John)</a>	<a href="#">2010052901001</a>
<input type="checkbox"/>	<a href="#">Box 4</a>	27/5/2010	Main Warehouse	sold	0.75	<input type="text" value="0.75"/>	<a href="#">Smith John (Smith.John)</a>	<a href="#">2010052901001</a>
<input type="checkbox"/>	<a href="#">Box 5</a>	27/5/2010	Room 101	removed	0.75	<input type="text" value="0.75"/>		
<input type="checkbox"/>	<a href="#">Box 8</a>	27/5/2010	Main Warehouse	out of order	0.75	<input type="text" value="0.75"/>		

Figure 3.27: From here, this supplier document can be updated in any way. It is also possible to check the items that have been entered through it (as precisely pictured in Fig.3.23) and ordered (as they were in Fig.4.9).

**3.6.3.3.2 Closing/reopening a supplier document** When closing a supplier document, as illustrated on Fig.3.28, a reminder of which items it held, and for how much, is given. It is necessary to input that amount in the 'Confirmation:' field in order to close

the document.

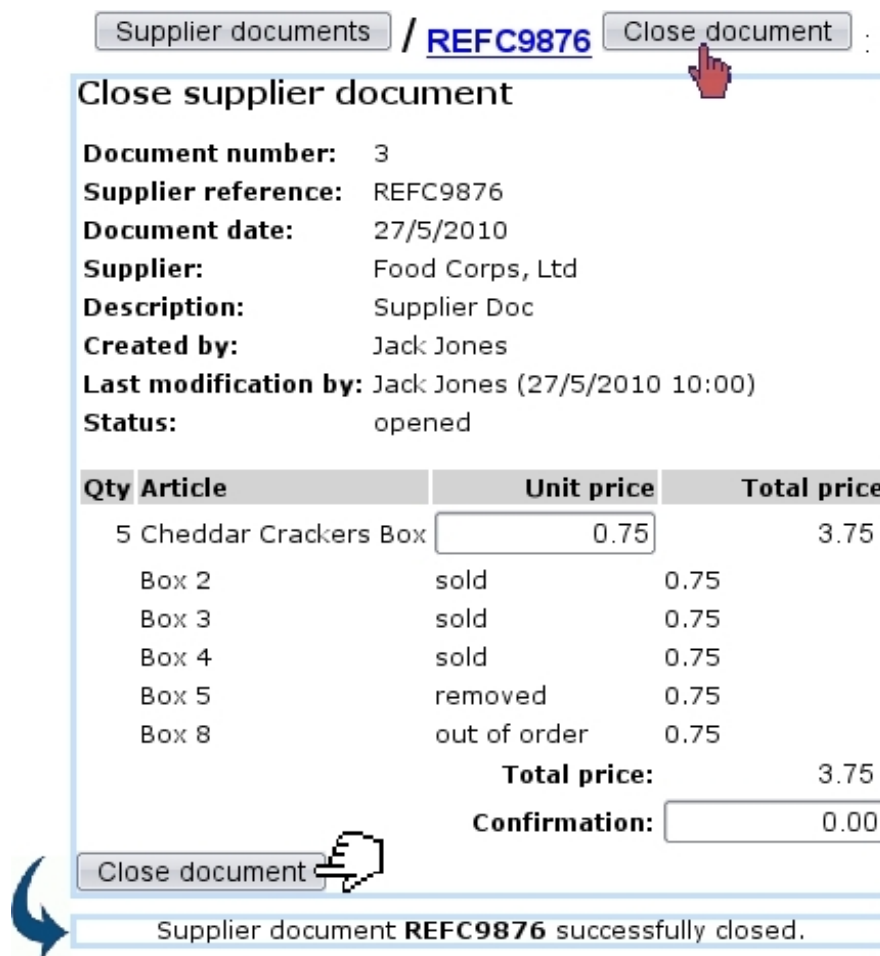


Figure 3.28: Closing a supplier document.

Once closed, it is still possible to reopen a supplier document, for instance by running a search on closed documents (Fig.3.29) ; an **Open document** button (replacing the previous **Open document**) will then take care of reopening.

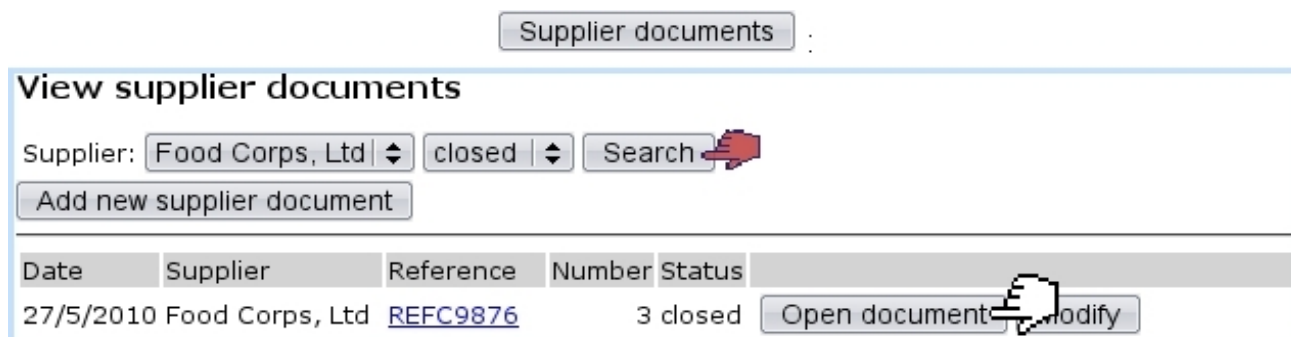


Figure 3.29: Reopening the supplier document as previously closed.

### 3.6.4 Delivery : the supplying of items for an order

Supplying items for orders can be performed in two ways :

- from the order, by looking for the items to supply : for this matter, please refer to 4.4.3 in the Orders chapter ;
- from the stock items, by looking for orders that contain those : this process is described below.

Through **Stock** / **Delivery**, as featured in Fig.3.30, stock items are searched for by stock category. Then, they are selected, and next is displayed a list of orders that feature this/these item/s.

The chosen order is finally successfully supplied.

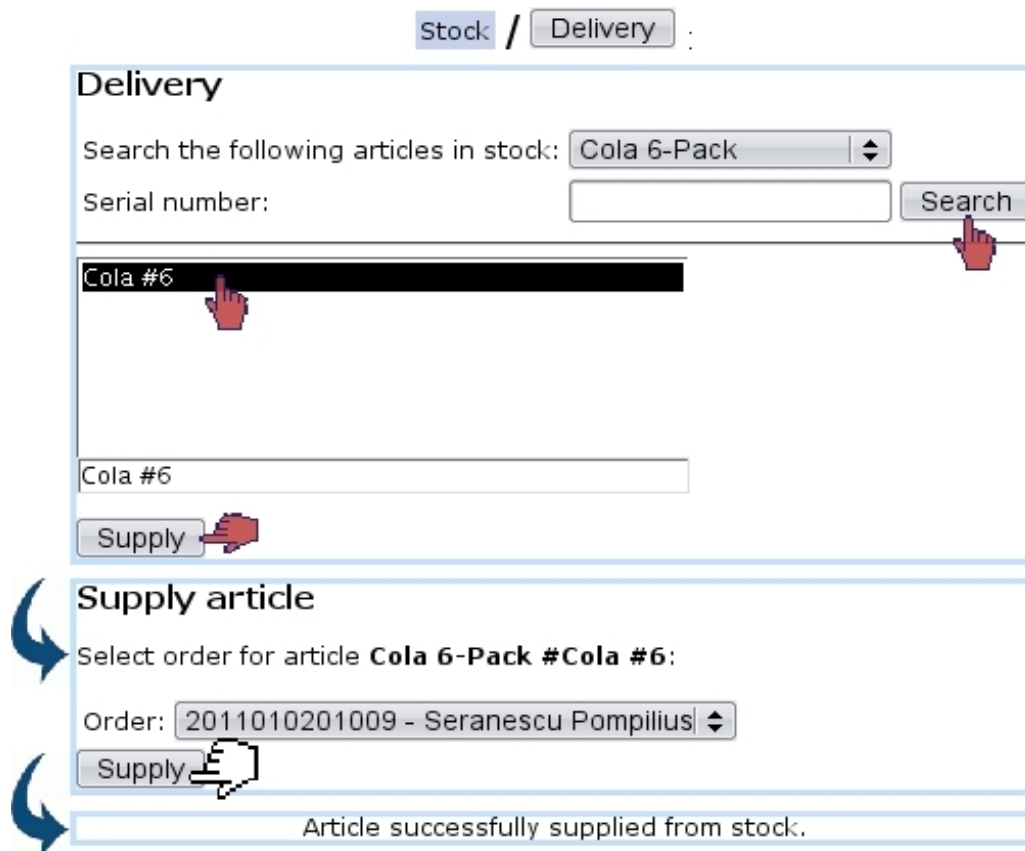

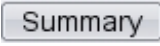


Figure 3.30: Using stock items to supply a particular order.

### 3.6.5 Managing stock items

Stock items offer can be managed in a wide array of manners.

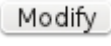
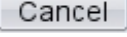
### 3.6.5.1 Stock summary

Clicking on the  /  button, as displayed in Fig.3.31, leads to the *Stock Summary Page*, which, contrary to the *Search In Stock Page* (3.33), does not cite articles extensively, but in quantities.

Search criteria and options include :



- a reference date until which orders are taken into account ;
- a specific stock category (3.6.1.3) ;
- comparison to the number of articles ordered ;
- the hiding of articles with null quantities to lighten the display ;
- a breakdown by stock locations (3.6.1.1), whether they are hidden or not.

Search results then show (depending on the activation of search criteria as cited above) :

- the number of copies that have been ordered, the quantities available in each stock location (if they are inferior to the defined 'minimum count for warnings' as defined for the stock article (3.6.1.4), those are displayed in red), and the subsequent balance ;
- each stock article name as a click-link, leading to a list of related orders ; there :
  - clicking on the order number brings to the corresponding *Order Details Page* (4.3) ;
  - right to each order number stand the quantities that have been ordered and supplied, and the subsequent balance to supply ;
  -  enables to go to the *Modify Order Page* for this very order (4.4.1) ;
  -  allows to cancel this order (4.4.2).

**3.6.5.1.1 External accounts associated with stock statuses** In the External System, when stock movement exports (6.1.4) are processed, amounts are written on certain accounts, namely default or specific 'stock article' and 'pending stock article' external accounts ; those are associated with stock articles/categories (3.6.1.3/3.6.1.4).

Other external accounts, this time associated with the aforementioned stock statuses, are mandatory for exports to be correctly processed : default or specific 'pending depreciation' and 'pending expenses' external accounts, as created in 6.1.1.

Through  /  it is then possible to assess expenses and depreciation accounts to each of the stock statuses, as shown in Fig.3.32.

In the External Accounts environment, it is necessary to create as many pending depreciation and pending expenses accounts as there are stock statuses.

Stock / Summary :

**Stock summary**

Reference date: 11/2/2011  Category: <Any>

Compare to number of ordered articles  Hide articles with all quantities null

Show location details  Show hidden locations

**Stock summary for category Crackers on 11/2/2011**

Stock article	Ordered	Stocked			Balance	Total
		Main Warehouse	Room 101	Total		
<a href="#">Cheddar Crackers Box</a>	39	47	3	50	11	50
<a href="#">Tomato crackers</a>	11	7	0	7	-4	7
<b>Total</b>	<b>50</b>	<b>54</b>	<b>3</b>	<b>57</b>	<b>7</b>	<b>57</b>

**Stock summary for article Cheddar Crackers Box**

Order	Client	Ordered	Supplied	Balance to supply	
<a href="#">2010122901033</a>	<a href="#">Barnes Cletus</a>	3	0	-3	<input type="button" value="Modify"/> <input type="button" value="Cancel"/>
...	...				...
<a href="#">2011020201001</a>	<a href="#">Bauer Kim</a>	1	0	-1	<input type="button" value="Modify"/> <input type="button" value="Cancel"/>
<b>Total</b>		<b>39</b>	<b>0</b>	<b>-39</b>	

Figure 3.31: The *Stock Summary Page*, a quantity-oriented view on stock.

### 3.6.5.2 Searching in stock

Clicking on the **Stock / Search in stock** button leads to the *Search In Stock Page* shown at Fig.3.33, whose main goal is to display stock items *extensively*.

Search criteria include :

- a specific stock article (3.6.1.4) ;
- in 'Status and stock:' and 'Latest status:' menus, various stock statuses (3.6.5.6), and for 'in stock' status, each stock location (3.6.1.1). The former menu applies if the chosen 'Reference date:' corresponds to the current date, while the latter does if that date is before the current date ;
- a serial number, or part thereof ;
- the latest stock status ;
- a specific supplier document (3.6.3.1).

Search results display stock items along with :

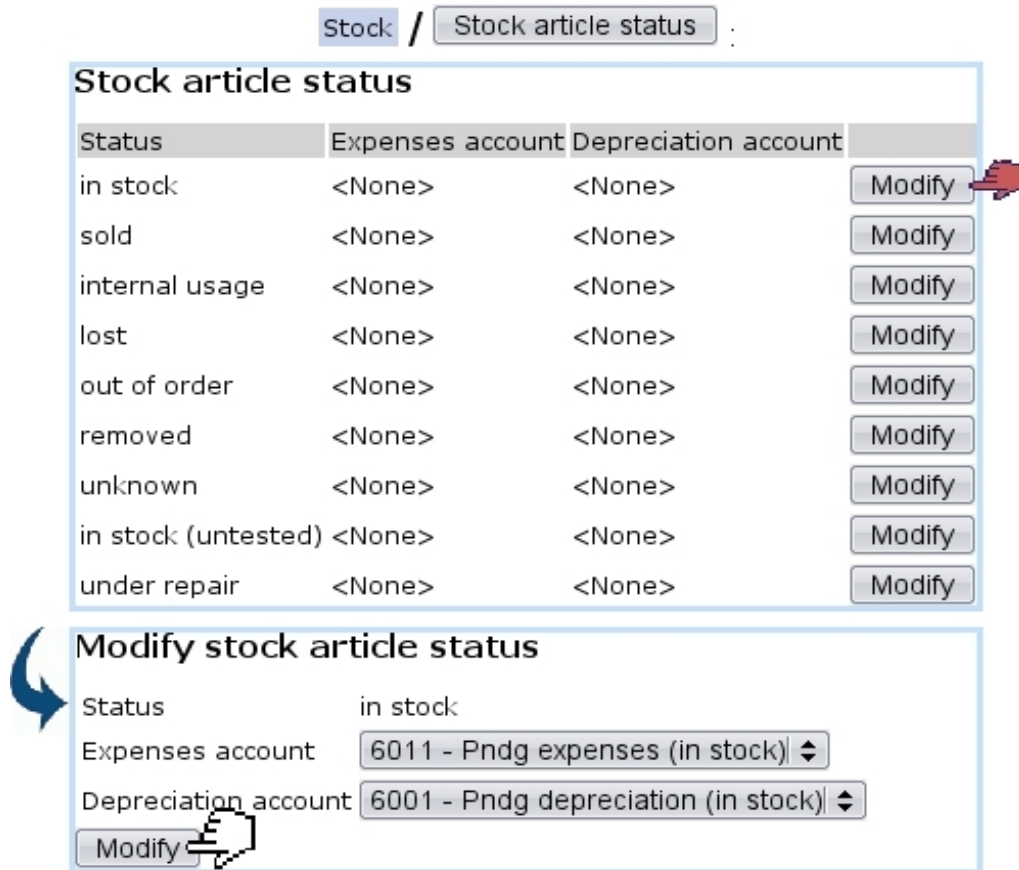


Figure 3.32: Associating a stock status with expenses and depreciation accounts.

- their serial number (as a click-link to their *Stock Details Page*, which is cleared up below at 3.6.5.3) ;
- their purchase price at the supplier (if it has been defined) ;
- their current value counting depreciation (3.6.2) ;
- the date they were entered in stock ;
- their current status, and, if they were was sold, the corresponding client and order number as click-links ;
- if applicable, the stock document (3.6.6) they are attached to.

At the bottom of the *Search In Stock Page*, depending on the status, several buttons are available to perform stock operations.



*For a more synthetic overview of the stock items currently present at a specific location, the **Stock Inventory view (3.6.5.4)** is advised.*



Stock /

### Search in stock

Article:  Status and stock:  Reference date: 28/5/2010

Serial number:  Latest status:  Document:

<input type="checkbox"/>	Article	Serial	Purchase price	Value	Stock entry	Status	Date	Delivered	Document
<input type="checkbox"/>	Cheddar...	<a href="#">Box 3</a> (4)	0.75	0.75	27/5/2010	sold	29/5/2010	[Orders and clients as click-links]	
<input type="checkbox"/>	Cheddar...	<a href="#">Box 2</a> (4)	0.75	0.75	27/5/2010	sold	29/5/2010		
<input type="checkbox"/>	Cheddar...	<a href="#">Box 4</a> (4)	0.75	0.75	27/5/2010	sold	29/5/2010		
	<b>Total</b>		2.25	2.25					

3 articles found

Figure 3.33: The *Search In Stock Page*.

**3.6.5.2.1 Performing stock operations from the *Consult Stock Page*** The checkbox left of each item serves as to select it if a stock operation can performed on it. The availability of stock operation buttons at the bottom of the *Search In Stock Page*, according to the status of the item, is cleared up at 3.6.5.7.

This way of performing stock operations on this page rather than on the *Stock Details Page* is more practical if a whole batch of items have to be operated on : it then only takes a single click.

### 3.6.5.3 The *Stock Details Page*

This page, as illustrated below, is accessed by clicking a stock item's serial number after a stock item search (3.6.5.2).

The *Stock Details Page* page first lists the item's name, its serial number, its status, the supplier document (if item had been entered with one) and the stock location it is at and then the full history of the stock operations (3.6.5.7) this stock item went through.

According to the status of the item, the bottom of the page might feature one or several buttons to perform stock operations on this item.

The item's history inside the stock includes :

- the value date of the operation (which can be modified) ;
- the operation itself ;

- which user processed it ;
- the date and time on which operation was done (cannot be modified) ;
- the status and stock location just after this operation ;
- if operation is related to an order :
  - the client’s name (as usual as a click-link to her/his *Client Management Page*, 2.3) ;
  - the order number (as a click-link to this order’s *Order Details Page*, 4.3).
- whether this operation has been exported (6.1.4) or not.

/ [Stock Article Search] [Box 3](#) :

**View stock details**

**Stock article:** Cheddar Crackers Box  
**Serial nbr:** Box 3  
**Status:** sold  
**Supplier document:** [REFC9876](#)  
**Purchase price:** 0.75  
**Current value:** 0.75  
**Location:** Main Warehouse  
**Order:** 2010052901001

Value date	Operation	User	Date	Status	Location	Client	Order	Price
29/5/2010	 delivery	Jack Jones	29/5/2010 12:11:30	sold	Main Warehouse	<a href="#">Smith John</a>	<a href="#">2010052901001</a>	0.75
27/5/2010	 stock entry	Jack Jones	27/5/2010 11:8:10	in stock	Main Warehouse			0.75

Figure 3.34: The *Stock Details Page* for a sold item.

### 3.6.5.4 Stock inventory

Through  / , as, featured on Fig.3.35, a very synthetic yet complete view of the current state of the stock is proposed.

Search criteria include :

- a reference date ;
- a range of dates in between which stock entry happened ;
- a stock status, either 'in stock' or 'in stock (untested)' (for stock items that have been returned (3.6.5.9)) ;

- a stock location (3.6.1.1) ; in addition to specific locations, 'all' as well as 'all internal' and 'all external' locations are proposed.

Results are shown by groups of stock items, with for each :

- its serial number as a click-link to its *Stock Details Page* (see above) ;
- when it was entered in stock ;
- the date of the last modification ;
- the purchase price at the supplier and the current value.

Stock / Inventory :

**Stock inventory**

Reference date: 16/2/2011

Stock entry from: 1/2/2011  to: 16/2/2011

Status:

Location:

**Stock inventory on 16/2/2011 in Room 101**

	Serial number	Stock entry	Last date	Purchase price	Value
<b>Gizmo</b>					
<input type="checkbox"/>	<a href="#">Type 242-1</a>	16/2/2011	16/2/2011	50.00	50.00
<input type="checkbox"/>	<a href="#">Type 242-2</a>	16/2/2011	16/2/2011	50.00	50.00
<input type="checkbox"/>	<a href="#">Type 242-3</a>	16/2/2011	16/2/2011	50.00	50.00
			<b>3</b>	<b>150.00</b>	<b>150.00</b>
<b>Pocket-sized McGuffin</b>					
<input type="checkbox"/>	<a href="#">Id 23</a>	9/2/2011	9/2/2011	29.90	29.90
<input type="checkbox"/>	<a href="#">Id 24</a>	9/2/2011	9/2/2011	29.90	29.90
			<b>2</b>	<b>59.80</b>	<b>59.80</b>
			<b>5</b>	<b>209.80</b>	<b>209.80</b>

Figure 3.35: Inventory of stock items currently present at a specific stock location.

### 3.6.5.5 Modifying stock items

If a stock item's serial number has been wrongly imputed for whatever reason, it is possible to modify it thanks to the  button.

This leads to a stock article search by type or serial number ; the corresponding item/s is/are then displayed and a click on the  button on its right finally leads the possibility to input a new serial number (Fig.3.36).

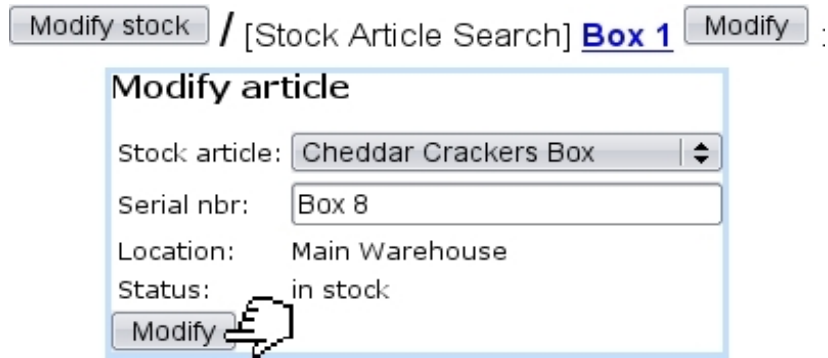


Figure 3.36: Changing the serial number of a stock item.

### 3.6.5.6 Stock article statuses

Stock article statuses aim to accurately describe the current state of a stock item :

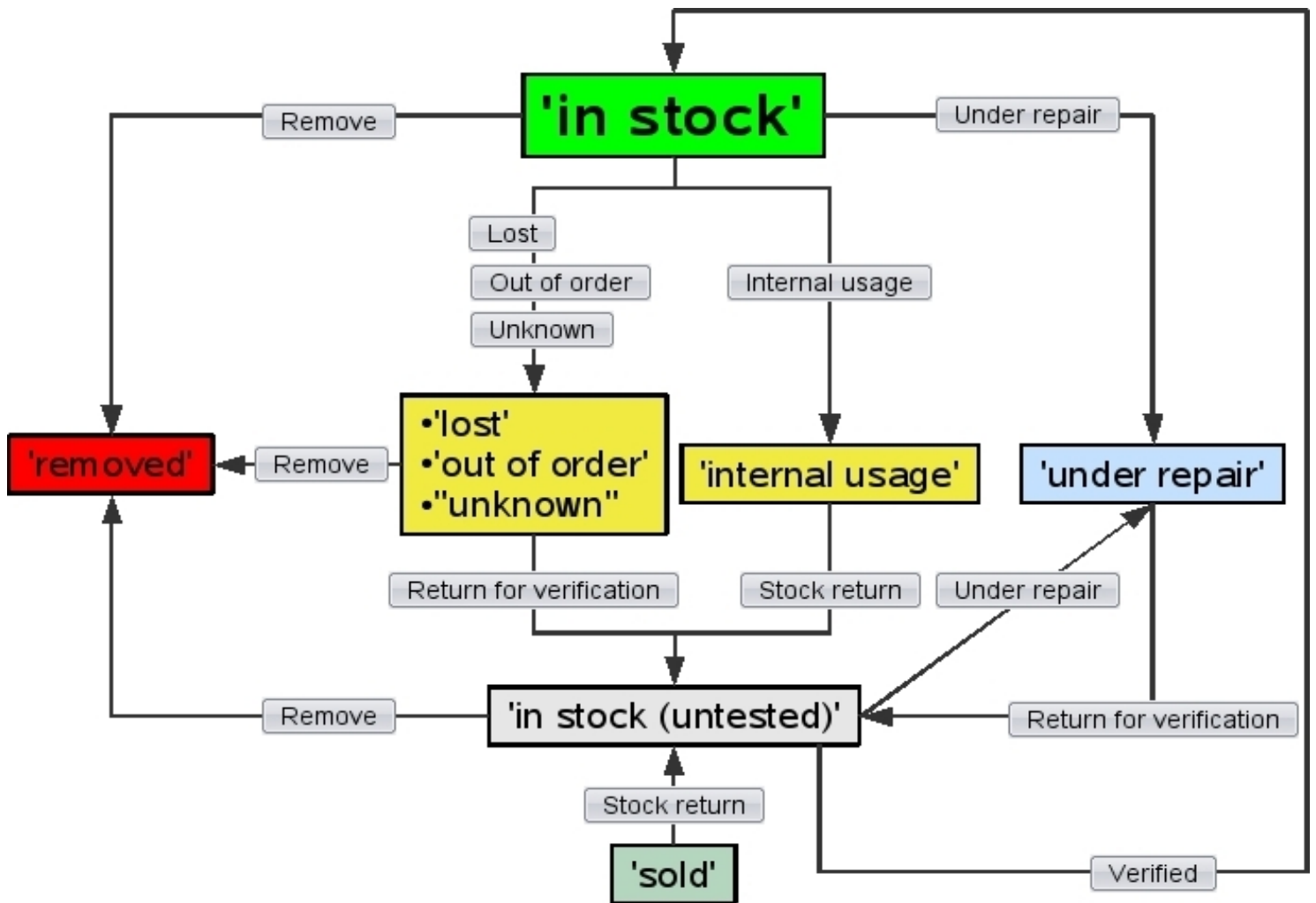
- 'in stock', available for each stock location (3.6.1.1), for instance 'in stock (Main Warehouse)';
- 'in stock (untested)', for articles that had been returned to stock (3.6.5.9) but have not been verified (3.6.5.11) yet ;
- 'sold', for ordered and delivered items ;
- six other statuses ('under repair', 'lost', 'internal usage', 'out of order', 'unknown' and 'removed') all meaning that the item has been removed from stock, either temporarily (3.6.5.8) or permanently (3.6.5.12).

The status of a stock item can be changed through stock operations.

### 3.6.5.7 Stock operations

Thanks to various buttons, it is possible to perform various operations on stock items ; these buttons may or may not exist according to the status of the stock item, and also whether user is at the *Search In Stock Page* (3.6.5.2) or the *Stock Details Page* (3.6.5.3).

Summed up, the flowchart of stock operations and corresponding statuses is as follows :



### 3.6.5.8 Getting an item out of stock

A stock item might sometimes have to be (temporarily) exited from stock for several reasons, which Blue Chameleon handles with the help of four buttons :

- **Lost** : the item cannot be found ;
- **Out of order** : it might not be suitable to be ordered, for whichever reason (needs fixing,...) ;
- **Internal usage** : it might not be ordered anymore but rather used within your company ;
- **Unknown** : it has to be exited for whichever reason ;

These buttons are available at both the *Search In Stock Page* (3.6.5.2) and the *Stock Details Page* (3.6.5.3) **only if item is in stock**.

The process is the same for the four operations, as shown in Fig.3.37.

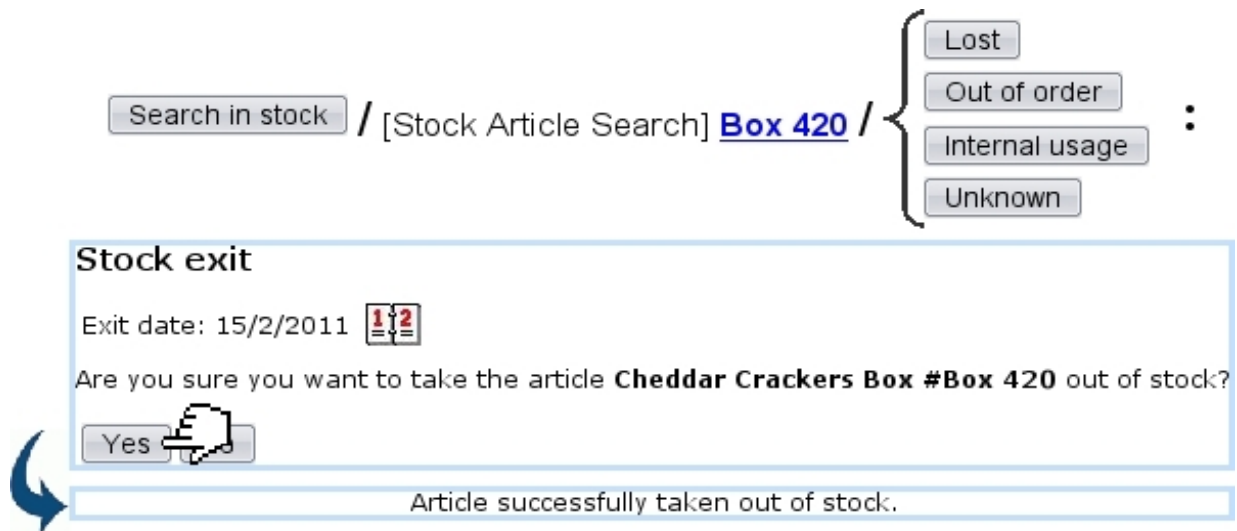


Figure 3.37: Taking a stock item out of stock (not irreversibly), from four possible causes.

After a click on any of these buttons, the stock item will get the eponymous status ('lost', 'out of order', 'internal usage', 'unknown'). Those four operations are reversible as the item can still be returned (3.6.5.9).

Reparation of a stock item 3.6.5.10 also works the same way.

### 3.6.5.9 Returning stock items back into stock



*The returning process only applies to items that have been temporarily exited (3.6.5.8), repaired (3.6.5.10) or sold (if client happens to return them).*

They can thus be put back into the active stock database via either the button **Stock return** (for 'sold' and 'internal usage' items) or **Return for verification** (for 'lost', 'out of order', 'unknown' and 'under repair' items). These buttons are both available at the *Search In Stock Page* and the *Stock Details Page*.

Fig.3.38 shows for instance how a lost item, if found, is put back again into stock.



*As returning an item into stock might mean that, after verification, it is somehow unsuitable to be sold as new again, the return process allows to flag a to-be-returned stock item as either 'second-hand' or still 'new'.*

*The former will then set the stock item's current price to 0, while the latter will leave this price to purchase price.*

Search in stock / [Stock Article Search] [Collector Box# 66](#) :

### View stock details

**Stock article:** Cheddar Crackers Box  
**Serial nbr:** Collector Box# 66  
**Status:** lost  
**Supplier document:** [NWDC1234](#)  
**Purchase price:** 2.25  
**Current value:** 2.25  
**Location:** Main Warehouse

Value date	Operation	User	Date	Status
8/2/2011	stock exit	Jack Jones	8/2/2011 9:17:0	lost
7/2/2011	stock entry	Jack Jones	7/2/2011 19:5:0	in stock

### Stock return

Return date: 15/2/2011

Status:

Location:

Are you sure you want to return the article **Cheddar Crackers Box #Collector Box# 66** into stock?

Article successfully returned into stock.

Figure 3.38: Putting back a previously-lost, now-found item into stock.

This returned item, to acknowledge the fact that something might have happened to it and that it is somehow unsuitable to be sold as new again, has now the status 'in stock (untested)'

Status

... in stock (untested) ...

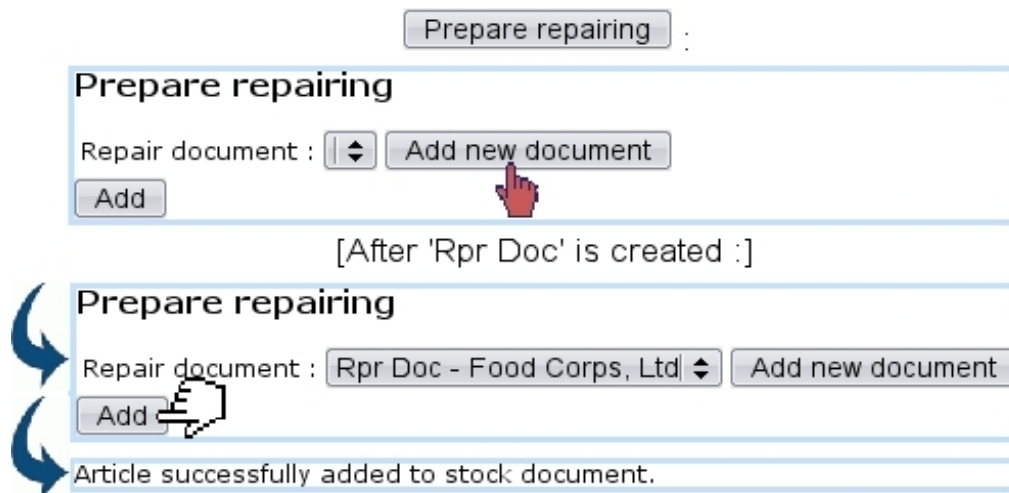


*An item can also be returned from the Shop Sale Page (4.6.4).*

It may undergo a repair stage.

### 3.6.5.10 Reparation of a stock item

The **Prepare repairing** button, as available only *Stock Details Page* for in-stock items, serves as to attach this stock item to a 'repair' stock document (3.6.6), which is created in that context (with the same fields as in Fig.3.41) :



Once the stock item has thus been added to the repair document, the **Prepare repairing** button becomes **Under repair**, which puts the stock item's status to 'under repair'.

As item is returned into stock (3.6.5.9) after the reparation, a verification can be done to put back the item's status into 'in stock'.

### 3.6.5.11 Verifying a returned stock item

On any returned item, several operations can be performed from the *Stock Details Page* :

**Search in stock** / [Stock Article Search] **Collector Box#66** :

**View stock details**

**Stock article:** Cheddar Crackers Box  
**Serial nbr:** Collector Box# 66  
**Status:** in stock (untested)  
**Supplier document:** [NWDC1234](#)  
**Purchase price:** 2.25  
**Current value:** 2.25  
**Location:** Main Warehouse

---

**[History of stock operations]**

**Verified** **Prepare repairing** **Internal usage** **Lost** **Out of order** **Remove** **Prepare transfer** **Change value**

Amongst those, the **Verified** is clicked whenever returned item (which was for instance lost and then found, or repaired) has been successfully tested and is apt to be put back in stock. Clicking on this button reverts the 'in stock (untested)' back to 'in stock'.



### 3.6.5.12 Definitely discarding an item



***Removing a stock item requires unrestricted user rights for 'Stock management' (11.2).***

Once sure that they will never be reintegrated, some items can be definitely exited, that is to say that their return possibility will be canceled irreversibly. This is achieved through the **Remove** button.

Afterwards, permanently deleted stock items can nonetheless be seen with **Search in stock** by selecting 'removed' as a search criterion.

### 3.6.5.13 Transfers

Through time, some stock items might be needed to be moved from one stock location to another. This operation is only possible for 'in stock' items, either directly from **Stock** / **Transfer stock** (as shown in Fig.3.39), or from the *Consult Stock Page* (3.6.5.2) and the *Stock Details Page* (3.6.5.3) via **Transfer**.

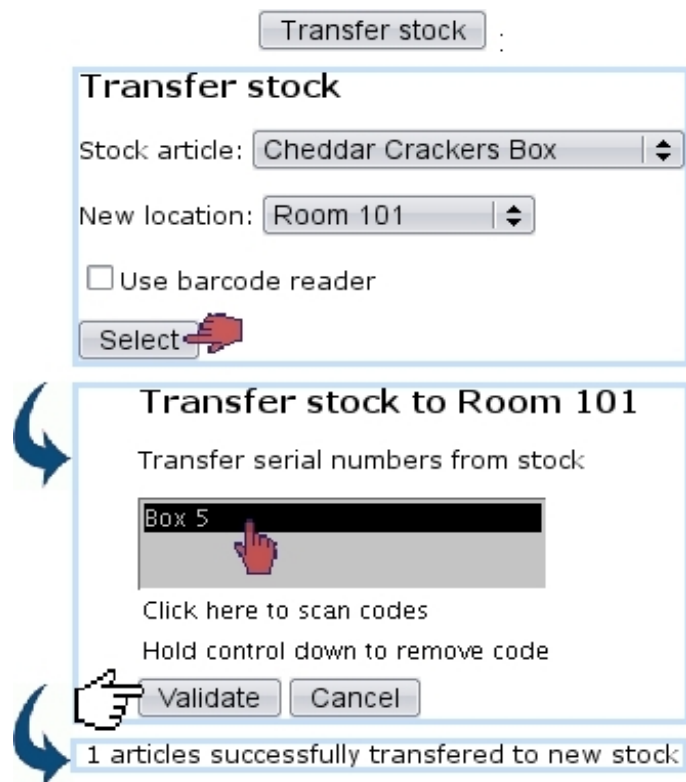


Figure 3.39: Transferring a stock item from one location to another.

If several items need to be transferred, it is easier to do the transfer from the *Consult Stock Page* as those can all be selected at the same time.

### 3.6.5.14 Exchanges

An exchange happens when an item (in a certain location) is swapped with another identical article (thus a *standard* exchange) in another location. This simple process, shown in Fig.3.40 is done via **Stock** / **Standard exchange**.

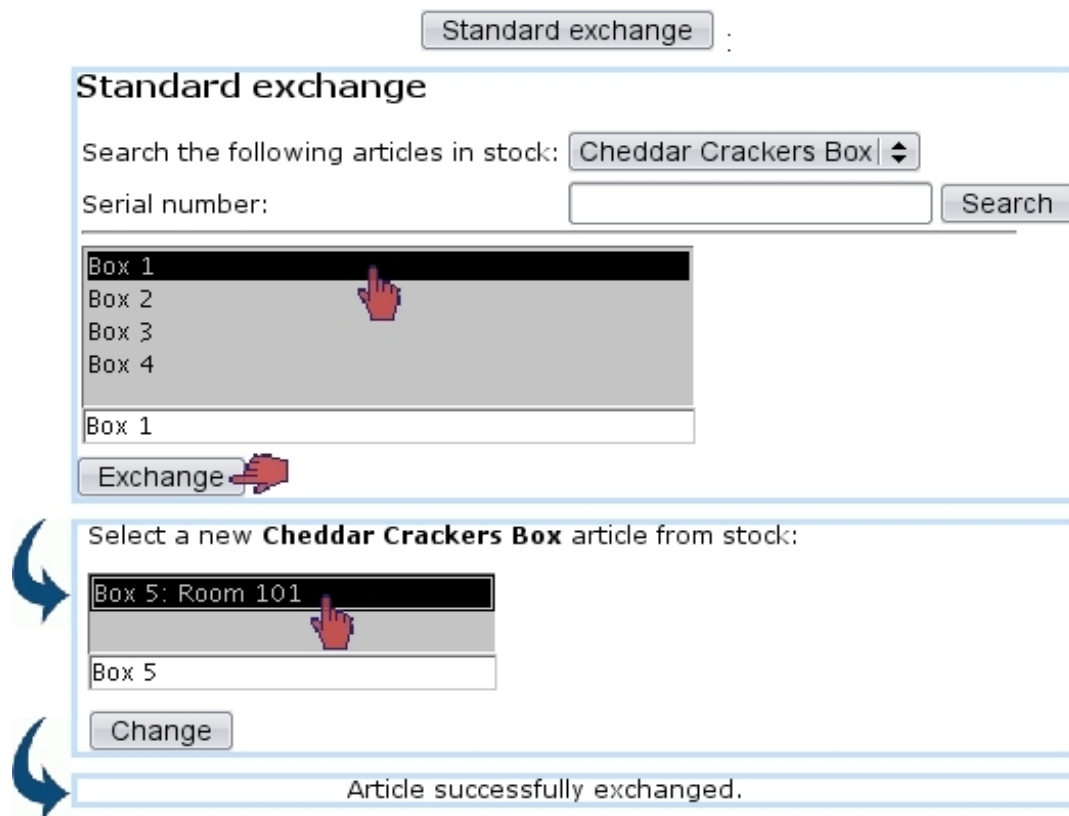


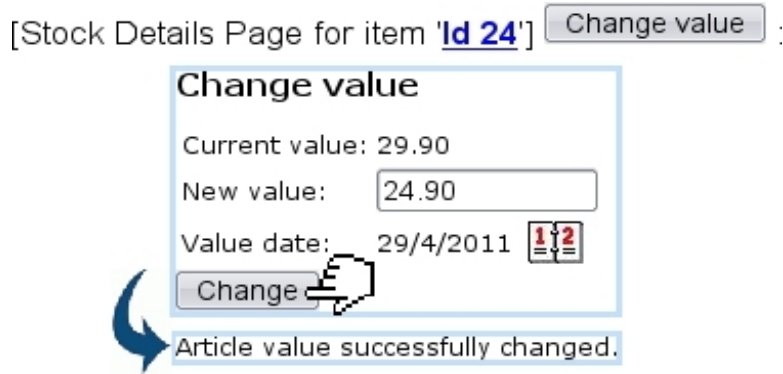
Figure 3.40: Exchanging the respective locations of two stock items.

### 3.6.5.15 Value of a stock item

The *Stock Details Page* (3.6.5.3) allows to perform certain actions on stock items, mostly related to prices.

For stock items that are either 'in stock' or 'in stock (untested)', it is possible to change their value to reflect possible loss due to obsolescence or other factors.

The **Change value** button as available on the *Stock Details Page* for in-stock items indeed allows to change the current value :



As a result, this value change is recorded as a true stock operation, along with the new price :

Value date	Operation	Price	Export
29/4/2011	value change	24.90	not exported

### 3.6.6 Stock documents

Blue Chameleon also allows to define and manage stock documents, via [Stock](#) / [Stock documents](#) .

#### 3.6.6.1 Creating a stock document

As featured on Fig.3.41, a stock document entails the following information :

- a type (Transfer document) ;
- a specific stock location (3.6.1.1) ;
- a name and associated comment.

#### 3.6.6.2 Generally managing stock documents

Fig.3.42 shows the screen from where stock documents, once added, can be generally managed.

From there :

- stock documents can be searched according to their status (open, sent closed) ;
- a [Modify](#) button for each document - provided it has not been closed - leads to a page where stock items can be added to it (3.6.6.3) ;
- a [Delete](#) button exists to remove stock documents which are still opened and to which no items had been added ;
- each document is a click link (e.g. [Doc Tsf 1](#)) leading to a page where, in addition to the list of items attached to it, document can be printed and closed (3.6.6.4).

Stock / Stock documents / Add new stock document :

### Add stock document

Type:

Location:

Document:

Comment:

Stock document successfully added.

Figure 3.41: Creating a stock document attached to location 'Main Warehouse'.

Stock / Stock documents :

### View stock documents

Type:

Date	Document	Type	Destination	Status	
26/4/2011	<a href="#">Doc Tsf 1</a>	Transfer document	Main Warehouse	opened	<input type="button" value="Modify"/> <input type="button" value="Remove"/>

Figure 3.42: Stock documents that have been created.

### 3.6.6.3 Adding items to a stock document

The  button for each opened stock document leads to a page illustrated at Fig.3.43 ; there :

- location, name and comment as inputed during stock document creation can be updated (type cannot be changed) ;
- a list featuring the stock items that have been attached to this document is shown with full information (serial number, stock article name, entry date, location, status,...) ; a  button allows to remove each stock item from the document ;
- stock items are added in the first place via - if their serial number is known -  or , which displays a pop-up featuring similar fields as seen in Fig.3.8.

### 3.6.6.4 Viewing, printing, closing stock document

As featured on Fig.3.44, clicking on a stock document name leads to a page where, similarly as above the stock items attached to the document are listed, plus :

### Modify stock document

Type: Transfer document  
 Location:   
 Document:   
 Comment:

Serial number	Article	Stock entry	Location	Status	Purchase price	Current value	Client	Order
<input type="text" value="Id 24"/>								

Serial number	Article	Stock entry	Location	Status	Purchase price	Current value	Client	Order
<a href="#">Id 24</a>	Pocket-sized McGuffin	15/2/2011	Room 101	in stock	29.90	29.90		<input type="button" value="X"/>

Figure 3.43: Adding a stock item to a stock document.

### View stock document

**Document:** Doc Tsf 1  
**Type:** Transfer document  
**Destination:** Main Warehouse  
**Comment:** For regular transfers  
**Created by:** Jack Jones (26/4/2011 8:47)  
**Status:** opened

Serial number	Article	Stock entry	Location	Status	Purchase price	Current value	Client	Order
<a href="#">Id 24</a>	Pocket-sized McGuffin	15/2/2011	Room 101	in stock	29.90	29.90		

Figure 3.44: Viewing a stock document.

- a  button allowing to create a PDF formatted printout (from a print template, see 13.2) of what is seen on the screen :

Print :

**Print stock document**

Model:


[Result on generated PDF] :



Document	Doc Tsf 1			
Type	Transfer document			
Destination	Main Warehouse			
Comment	For regular transfers			
Created by	Jack Jones(26/4/2011 8:47)			
<b>Serial number</b>	<b>Article</b>	<b>Stock entry</b>	<b>Location</b>	<b>Status</b>
Id 24	Pocket-sized McGuffin	15/2/2011	Room 101	in stock

- a  (only for opened documents) button that permits to close this stock document :

:



Are you sure you want to close the stock document Doc Tsf 1?

Stock document successfully closed.

## 3.7 The 'Subscription' system



User rights for subscription management (creating, viewing, modifying,...) can be set up either at the *Modify User Page* (Fig.9.17) or the *User Right Page* (11.2) under the element

### Subscription management

Your company may provide services that take place for a certain amount of time ; subscriptions, for that matter, are handled into Blue Chameleon in a straightforward way. They are created, ordered and invoiced as any other article, but, due to their specific nature, offer more managing options than standard articles.

Subscriptions are mainly managed from the *Subscription Management Page* (Fig.3.45), which is accessed via **Clients** / **Subscriptions**.



Figure 3.45: The *Subscription Management Page*, with buttons designed to accomplish any subscription-related action.

### 3.7.1 Subscription basics

The following clears up everything about the elemental uses of subscriptions.

#### 3.7.1.1 Creating a subscription

In the following example as featured in Fig.3.46, a new subscription 'At-Home Delivery, 1 Month' is created under the article type 'At-Home Delivery' and the category 'At-Home Delivery Subscriptions' ; this type and this category are created normally and therefore are not different from any standard article type and category.

This new subscription is created as an article and is declared as a subscription by picking 'Subscription' in the 'Usage type:' drop-down menu, which only appears if 'Article Subscriptions' has been enabled on the *Merchant Configuration Page* (9.1.4).

Articles / Articles / Add new 'At-Home Delivery' article :

**Add article**

Article type: At-Home Delivery ▾

Article name: At-Home Delivery, 1 Month

Order label: At-Home Delivery, 1 Month

Category: At-Home Delivery Subscriptions ▾

...

Usage type: Subscription ▾

...


Add 

Figure 3.46: Adding a new subscription article.

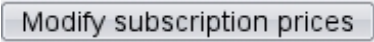
As this new subscription is created, a screen with dedicated subscription options appears as shown at Fig.3.47.

The 'Order subscription in advance first' checkbox, if ticked, makes it possible to start the subscription even if payment for it was not registered. If not ticked, payment will have to be registered before starting the subscription.

Finally, upon validation of these options (as well as from a *View Article Page*), a screen showing the subscription's main properties is displayed (Fig.3.48).


### 3.7.1.2 Editing a subscription

Once created, a subscription article can be edited thanks to the buttons as seen on the *View Subscription Page* as illustrated above.

In particular, its price can then be modified through  as shown in Fig.3.49.

### 3.7.1.3 Searching for subscriptions

While ordered and invoiced similarly as to a material article, a subscription is mainly different in that it is time-related : it can be started as soon as created, or started at a later date.

Any ordered subscription can be looked for from the simple search page accessed via  button. As shown by Fig.3.50, it provides the following :

- diverse search criteria such as led by order number, subscription article, salesperson and status ;



Add :

### Add subscription 'At-Home Delivery, 1 Month'

Base validity:	<input type="text" value="1"/>	
Base validity type:	<input type="text" value="Months"/>	
Base price:	<input type="text" value="50"/>	(VAT incl.)
Follow-up validity:	<input type="text" value="1"/>	
Follow-up validity type:	<input type="text" value="Months"/>	
Follow-up price:	<input type="text" value="50"/>	(VAT incl.)
Minimum duration:	<input type="text" value="1"/> months	
Maximum duration:	<input type="text" value="12"/> months	
Billing type:	<input type="text" value="Full billing"/>	
	<input checked="" type="checkbox"/> Order subscription in advance first	
Credit control type:	<input type="text" value="&lt;None&gt;"/>	
Article SLA:	<input type="text" value="Normal"/>	
Validity tolerance:	<input type="text" value="0"/>	
Tolerance type:	<input type="text" value="Months"/>	
External library data:	<input type="text" value="0"/>	
Token:	<input type="text" value="&lt;None&gt;"/>	
Token data:	<input type="text" value="0"/>	
	Backoffice	Frontoffice
Configuration script:	<input type="text" value="&lt;None&gt;"/>	<input type="text" value="&lt;None&gt;"/>
View script:	<input type="text" value="&lt;None&gt;"/>	<input type="text" value="&lt;None&gt;"/>
Consumption script:	<input type="text" value="&lt;None&gt;"/>	<input type="text" value="&lt;None&gt;"/>
Event script:	<input type="text" value="&lt;None&gt;"/>	
	<input checked="" type="checkbox"/> Send client identification to event script on begin/activation/deactivation/end	
	<input type="checkbox"/> Don't send confirmation on activation/deactivation	
External free subscriptions account:	<input type="text" value="&lt;Default&gt;"/>	

Figure 3.47: Once a new subscription has just been created, this screen allows to define all of its properties.

- sort and version options, with for the latter the following choices : normal version (subscriptions are shown as in Fig.3.50), print version (subscriptions are listed on a new page, without the search form) and export version (a .CSV file of the

[View 'At-Home Delivery Subscriptions' articles Page] [At-Home Delivery, 1 Month](#) :

<b>At-Home Delivery, 1 Month</b>			
<b>Article type:</b>	At-Home Delivery	<b>Base price:</b>	50.00 USD (1 months )
<b>Category:</b>	At-Home Delivery Subscriptions	<b>Follow-up price:</b>	50.00 USD (1 months )
<b>Subscription price:</b>	50.00 USD	<b>Duration:</b>	1to12month(s)
<b>Usage type:</b>	Subscription	<b>Billing type:</b>	Full billing
<b>Invoices:</b>	Complete invoices for this article	<b>Order:</b>	normal
<b>External account:</b>	<Default>	<b>External free subscriptions account:</b>	<Default>
<b>External expenses account:</b>	<Default>		
<b>Credit note account:</b>	for Subs		

Figure 3.48: The subscription's main details.

[At-Home Delivery, 1 Month](#) /  :

**Modify 'At-Home Delivery, 1 Month' subscription price**

Register subscription price modification in USD (VAT incl.)

Date:  -  -

Base price:

Follow-up price:

Figure 3.49: Updating the price of a subscription article.

subscription list is generated) ;

- a menu featuring subscription lists (3.7.3), with possibility to fill into the selected list the search results, or add a new list.

The management of a particular subscription is accessed by clicking on its name as it appears on this page.

An advanced search page, accessed via , also exists. As displayed in Fig.3.51, it features a multitude of criteria, each being set by operators and values. Also, subscription list facilities are available.

### 3.7.1.4 Starting a subscription

As described below, a subscription can be started anytime.

#### 3.7.1.4.1 Starting a subscription on the current day

By clicking on the

[At-Home Delivery, 1 Month](#)

Existing subscriptions :

**View subscriptions**

Order number:  Subscription status:

Subscription article:  Salesperson:

Sort:  Version:

View canceled orders

Clear list set before filling

---

2 subscriptions found

Order	Client	Subscription	Status	Start	End
<a href="#">2008060901003</a>	<a href="#">Smith John</a>	<a href="#">At-Home Delivery, 1 Month</a>	ordered in advance		
<a href="#">2008060901002</a>	<a href="#">Bauer Kim</a>	<a href="#">At-Home Delivery, 1 Month</a>	ordered in advance		

Figure 3.50: A subscription search, showing two recently ordered subscriptions waiting for activation.

link besides client name [Bauer Kim](#), a page from which to manage this client's newly ordered subscription is displayed (Fig.3.52).

If for instance this client wishes her subscription to start right now,  has to be clicked on ; next validation screen as shown by Fig.3.52 puts the start date at the current date.

This page features a  button allowing to see all subscription lists (3.7.3) that this particular lists belongs to.

**3.7.1.4.2 Starting a subscription on another day** If now client John Smith wants his subscription to start on a later date,  is the button to click on this time ; as shown by Fig.3.53, the start and end dates of subscription are chosen.

### 3.7.1.5 Subscription statuses and operations

The ways the two subscriptions above were defined yield the statuses shown at Fig.3.54. It can be seen that Kim Bauer's subscription is now 'activated', while John Smith's one is still 'ordered in advance'. Actions can be taken on 'activated' subscriptions, as the page for such a subscription shows several buttons.

**3.7.1.5.1 Blocking access to a subscription** A subscription's access might have to be blocked if client is faulty in any way : during the block, subscription continues to be charged. This action is achieved with through .

Search subscriptions :

### Search subscriptions

Order number	like	2008	Add
Subscription status	=	ordered in advance	Add
Subscription article	=	At-Home Delivery, 1 Month	Add
Client article list	contains	-----	Add
Stock status	=	in stock(Main Warehouse)	Add
Start of subscription	=	1 - 1 - 2008	Add
Credit subscriptions	=		Add
Salesperson	=	Dick	Add
Subscription	in	Set AHD	Add

**Selected options:**

and order number	like 2008	Remove
and subscription article	= At-Home Delivery, 1 Month	Remove
and start of subscription	= 1/1/2008	Remove
and salesman	= Dick	Remove

Normal version   
  sort by orders   
  Search canceled orders   

  
 Clear list set before filling   
   

**5 subscriptions found**

Order	Client	Subscription	Status	Start	End
<a href="#">2008060901006</a>	<a href="#">Durden Tyler</a>	<a href="#">At Home (...)</a>	suspended	11/6/2008	
<a href="#">2008060901005</a>	<a href="#">Barnes Cletus</a>	<a href="#">At Home (...)</a>	activated	9/6/2008	11/6/2008
<a href="#">2008060901004</a>	<a href="#">Parker Ken</a>	<a href="#">At Home (...)</a>	suspended	9/6/2008	
<a href="#">2008060901003</a>	<a href="#">Smith John</a>	<a href="#">At Home (...)</a>	ordered in advance	15/6/2008	14/7/2008
<a href="#">2008060901002</a>	<a href="#">Bauer Kim</a>	<a href="#">At Home (...)</a>	activated	9/6/2008	8/7/2008

Figure 3.51: An advanced subscription search, led on orders done in 2008, on subscription articles 'At-Home Delivery, 1 Month', on client article list containing this subscription and done by salesman Dick.

The block date can either be the current date (Fig.3.55) or an ulterior date (Fig.3.56).

**3.7.1.5.2 Suspending a subscription** Suspending a subscription is done on a client's request if he does not need that subscription service for an undefined period of time. This action is done via  (Fig.3.57). The suspend date, as above, can either be right now or scheduled to another date.

[2008060901002 Bauer Kim At-Home Delivery, 1 Month](#) :

**View subscription At-Home Delivery, 1 Month**

<b>Order number:</b>	<a href="#">2008060901002</a>	<b>Username:</b>	Bauer.Kim
<b>Status:</b>	ordered in advance	<b>Title:</b>	Miss
<b>Start of subscription:</b>	not specified	<b>Name:</b>	Bauer Kim
<b>End of subscription:</b>	not specified	<b>Address:</b>	23 Palmetto Drive 90000 Los Angeles USA
		<b>Current SLA:</b>	Normal

---

**Invoices**

Period	Date	Data type	Type	Reference
6/2008	9/6/2008 9:12	subscription	invoice	<a href="#">#2008060901002</a>

Modify Start Cancel

**Start subscription At-Home Delivery, 1 Month**

Start of subscription: 9 - 6 - 2008 (DD-MM-YYYY)

Parent subscription: <none>

Continuation of subscription: <none>

Number of free periods: 0 months

Internal authorization:

Start

Figure 3.52: The page for a client's subscription, that we choose to start right now.

[2008060901003 Smith John At-Home Delivery, 1 Month](#) :

Modify Start Cancel

**Modify subscription At-Home Delivery, 1 Month**

Order number: [2008060901003](#)

Start of subscription: 15 - 6 - 2008

End of subscription: 14 - 7 - 2008

Parent subscription: <none>

Continuation of subscription: <none>

Number of free periods: 0

Modify

Figure 3.53: Starting a subscription on another date.

**3.7.1.5.3 Finishing a subscription prematurely** If client decides s/he does not need that subscription service anymore, a subscription can be finished on the moment or

Order	Client	Subscription Status	Start	End
<a href="#">2008060901003</a>	<a href="#">Smith John</a>	<a href="#">At-Home...</a>	ordered in advance	15/6/2008 14/7/2008
<a href="#">2008060901002</a>	<a href="#">Bauer Kim</a>	<a href="#">At-Home...</a>	activated	9/6/2008

Modify   Block access   Suspend subscription   Finish   Reset subscription   Cancel

Figure 3.54: An 'activated' subscription's page shows a wide variety of possible actions.

[2008060901002](#) [Bauer Kim](#) [At-Home Delivery, 1 Month](#) **activated** / [Block access](#)

**Block subscription At-Home Delivery, 1 Month**

Block date: 9 - 6 - 2008 (DD-MM-YYYY)

Description: Blocking now

[Change](#)

[2008060901002](#) [Bauer Kim](#) [At-Home Delivery, 1 Month](#) **blocked** 9/6/2008

Figure 3.55: Blocking a client's subscription, starting right now.

[2008060901002](#) [Bauer Kim](#) [At-Home Delivery, 1 Month](#) **activated** / [Block access](#)

**Block subscription At-Home Delivery, 1 Month**

Block date: 10 - 6 - 2008 (DD-MM-YYYY)

Description: Blocking starts this day

[Change](#)

	Date	Label	User	Execution
<b>Block :</b>	10/6/2008	Block starts this day	Dick	9/6/2008 11:58

Figure 3.56: Scheduling a subscription block for another day ; the scheduled operation appears in this subscription's page.

scheduled to an ulterior day thanks to the [Finish](#) button (Fig.3.58).

**3.7.1.5.4 Reactivate a subscription** If needed (Blue Chameleon user decides to restart a blocked/suspended subscription), as shows Fig.3.59, a blocked or suspended subscription can be reactivated on the current date or on a scheduled date.

**3.7.1.5.5 Resetting a subscription** Whatever its status is, a subscription can be put back into the 'ordered in advance' status (i.e., the status when it has just been ordered) thanks to the [Reset subscription](#) button.



Figure 3.57: Suspending a subscription right on the moment.



Figure 3.58: Prematurely finishing a subscription ; end date now displays.



Figure 3.59: Putting blocked and suspended subscriptions back into the green 'activated' status.

As displays Fig.3.60, this possibility is for instance useful when a subscription has been given an end date that should be changed.

### 3.7.2 Monthly invoices


 *For monthly invoices to be generated, "Scheduler tasks" must be enabled at the Merchant Configuration Page (9.1.7).*



Figure 3.60: This subscription's premature end date is canceled by resetting.

Blue Chameleon handles the automatic creation of monthly invoices for subscriptions, with actions performed from the *Monthly Invoice Management Page*, accessed via [Subscriptions](#) / [Monthly invoice management](#) (Fig.3.61).

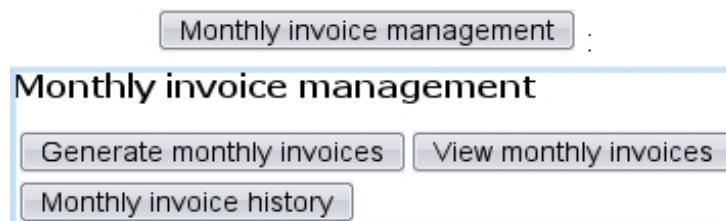


Figure 3.61: The *Monthly Invoice Management Page*, with buttons designed to accomplish any action related to subscription monthly invoices.

### 3.7.2.1 Generating monthly invoices

Monthly invoices are generated via the [Generate monthly invoices](#) button. As shown in Fig.3.62, a specific month and year can be chosen as well as a specific category and/or article and also the invoice mode (individual invoices/individual invoices if no fees/unique invoice per client).

Once started, the invoice generation process then displays how many subscriptions it is going to work on. Finally the number of added invoices is shown.

It is also possible to [Start later](#) the generation of monthly invoices ; upon click of this button, a screen will then ask on which day and at which time the generation will be started.

### 3.7.2.2 Validating monthly invoices

These newly created invoices are still temporary and can be checked out before final validation. This is achieved via the [View monthly invoices](#) button at the *Monthly Invoice Management Page*.



Monthly invoice management / Generate monthly invoices

**Generate monthly invoices**

Generate invoices for (Month-Year): 6 - 2008

Categories:  <all>  
 At-Home Delivery / At-Home Delivery Subscriptions  
 RFS Hot Line / RFS HotLine 800

Invoicing mode: Unique invoice per client

Start immediately Start later Select articles

**Generate monthly invoices for 6/2008**

Preparation done, 4 subscriptions to be treated  
Continue with initialization

Continue

**Generate monthly invoices for 6/2008**

Treated 4 subscriptions in 0 secs.

4 new invoices for a total amount of 232.00 successfully added for 6/2008

All subscriptions treated for this month  
**A total of 4 invoices for a total amount of 232.00 added for 6/2008**

Figure 3.62: Generating monthly invoices for June 2008 concerning 'At-Home Delivery, 1-Month' subscriptions. At the end, 4 invoices related to 4 subscriptions have been created.

As shown at Fig.3.63, a list of temporary monthly invoices is then displayed, each featuring its reference, the client name, the order number, the date it will be sent and by which mean.

### 3.7.2.3 Monthly invoice history

As displayed at Fig.3.64, invoice general information as well as details about a specific month can be seen via [Monthly invoice history](#).

## 3.7.3 Subscription lists

Similarly as for client lists (2.4), subscription lists allow to create groups of subscriptions according to their particular features (e.g. subscriptions that are prone to problems,...).

### 3.7.3.1 Creating a subscription list

While at the *Subscription Management Page* (Fig.3.45), a subscription list is added via [Object lists](#) / [Add new object set](#) ; where, as shown at Fig.3.65, its name is defined

[Monthly invoice management](#) / [View monthly invoices](#)

### View temporary monthly invoices

4 invoices found

[Select all invoices](#)   [Uncheck all invoices](#)

<input checked="" type="checkbox"/>	<a href="#">2008060901002/1 Bauer Kim</a>	[...]	At-Home Delivery, 1 Month 7/2008	1	50.00	50.00
			Standard mail 7/2008	1	8.00	8.00
						<b>Total: 58.00</b>
<input checked="" type="checkbox"/>	<a href="#">2008060901006/1 Durden Tyler</a>	[...]	At-Home Delivery, 1 Month 7/2008	1	50.00	50.00
			Standard mail 7/2008	1	8.00	8.00
						<b>Total: 58.00</b>
<input checked="" type="checkbox"/>	<a href="#">2008060901004/1 Parker Ken</a>	[...]	At-Home Delivery, 1 Month 7/2008	1	50.00	50.00
			Standard mail 7/2008	1	8.00	8.00
						<b>Total: 58.00</b>
<input checked="" type="checkbox"/>	<a href="#">2008061001001/1 Salazar Ramon</a>	[...]	At-Home Delivery, 1 Month 7/2008	1	50.00	50.00
			Standard mail 7/2008	1	8.00	8.00
						<b>Total: 58.00</b>
						<b>Total (4): 232.00</b>

[Validate selected invoices](#)   [Cancel selected invoices](#)

Figure 3.63: The list of temporary invoices just before their final validation.

[Monthly invoice management](#) / [Monthly invoice history](#)

### History of monthly generated invoices

Opened	Closed	Status	User	Period	Invoices	Amount	
11/6/2008 12:17	11/6/2008 12:28	validated	admin	6/2008	4	232.00	<a href="#">Details</a>

### Details of monthly generated invoices

**Opened:** 11/6/2008 12:17  
**Closed:** 11/6/2008 12:28  
**Status:** validated  
**User:** admin  
**Period:** 6/2008  
**Selected categories:** At-Home Delivery Subscriptions  
**Invoices:** 4  
**Amount:** 232.00

Figure 3.64: The list of monthly invoices that have been generated and the details of the June, 2008 one.

as well as an optional comment.

Those can be afterwards modified through [Object lists](#) / [Set AHD](#) [Modify](#).

Subscriptions / Object lists / Add new object set :

**Add object set**

Name:

Comment:

Figure 3.65: Creating a new subscription list.

### 3.7.3.2 Processing a subscription list

The processing of a subscription list, as done from  provides the options shown at Fig.3.66.

Subscriptions /  / [Set AHD](#) :

**Work with object list Set AHD**

Figure 3.66: This *Work Set Process Page* is specifically designed to accomplish actions on subscription lists.

### 3.7.3.3 Filling a subscription list

A set can be filled with subscriptions from the two search pages as shown in 3.7.1.3, which feature a menu with all defined subscription lists. Pick the one you wish to add the search results to, and, as shown on Fig.3.67, click on .

The subscriptions matching the search criteria are thus added to the chosen subscription list (which can be cleared before filling by ticking the 'Clear list set ...' beforehand).

### 3.7.3.4 Featured subscription lists

A subscription might often belong to several lists. To see and also manage the lists associated with a particular subscription, its name (as displayed after a subscription search) is clicked, and, on the following page as featured in Fig.3.52, a  button allows to see in a pop-up all the lists this subscription belongs to.

Subscriptions / Search subscriptions :

**Search subscriptions**

...

Subscription status =  Add

Subscription article =  Add

...

**Selected options:**

and subscription status = finished

and subscription article = At-Home Delivery, 1 Month

Normal version  sort by orders  search canceled orders

Clear list set before filling

All found subscriptions added to selected object set.

Figure 3.67: Adding finished 'At-Home Delivery, 1 Month' subscriptions to set 'AHD'.

As shown on Fig.3.68, the display, list search criteria and adding/removing facilities are similar to the *Client list* pop-up (2.4).

At-Home Delivery, 1 Month / Lists :

**Lists featuring At-Home Delivery, 1 Month :**

Usergroup :  User :  Last modified

Title	Description	User	
Cmpl Level 3	Most complained-about subs	Jack Jones	<input type="button" value="Remove"/>

Figure 3.68: List(s) featuring a particular subscription.

### 3.7.4 Handling of subscriptions with consumptions

All the examples above dealt with a subscription article of 'normal' usage. Now, Blue Chameleon also handles more complicated subscriptions, that is to say ones with an associated consumption : clients subscribe to a service that is invoiced according to their use of it. For instance, how much time they used it, or the amount of data they may

have downloaded...

While creating the subscription article, we now either pick, for 'Usage type:' :

- Subscription with variable consumption : client must pay a price for the subscription itself and also the consumption s/he makes of it. Or :
- Variable consumption only : only the consumption will be paid for.

Fig.3.69 shows the creation of a subscription article with variable consumption, for instance a hotline where clients can call to have dedicated advice.

Articles / Articles / Add new 'RFS Hot Line' article :

**Add article**

Article type: RFS Hot Line

Article name: Recipe Advice Line

...

Unit price: 10.00 (VAT incl.)

...

Usage type: Subscription with variable consumption

...

Add

...

Base quantity units: 1

Follow-up quantity units: 1

Quantity units type: minutes

Unit price: 0.1 (VAT incl.)

Max. units total price: 0.00 (VAT incl.)

Display units type: minutes

Display units type label: Minutes

...

Modify

Figure 3.69: Creating an subscription article that will handle both a subscription fee (10\$) and a consumption (0.1\$ per minute).

It can be seen that first, the cost of the subscription itself is chosen just as for a 'normal' subscription ; then, on next screen, the quantity unit type is picked : it is the time span by which the subscription is counted (seconds, minutes, hours, or multiple of bytes), and for a specified unit price. In this example, the 'Recipe Advice Line' cost is calculated for each minute, each minute being charged 0.1 \$.

#### **3.7.4.1 Adding a new consumption type**

[In Development]

#### **3.7.4.2 Managing existing consumption types**

[In Development]

#### **3.7.4.3 Subscription statistics**

[In Development]

# Chapter 4

## Order Management

This Chapter exposes how clients' orders are processed through Blue Chameleon.



*User rights for order management (making, viewing, updating,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Order management

## 4.1 Making an order

The steps to register a basic client order are described next.



*For orders to be done, the 'Shopping' menu at the Merchant Configuration Page (9.1.5) must be set to any other value than 'disabled'.*

### 4.1.1 Choosing articles and filling-up the shopping cart

Following **Clients** / **Add order** will bring you to a list of all categories sorted by types. Click on the category which holds the to-be-ordered article, for instance 'Crackers' and thus will be displayed a list of all articles contained therein, along with their unit price.

They are sorted according to what had been chosen for the 'Article order:' menu on the related category's page (3.1.2.2). Clicking on the article to order, for example *Cheddar Crackers Box*, leads to a page listing this item's unit price, its availability, its description the quantity to be ordered and a **Add to Shopping Cart** button.

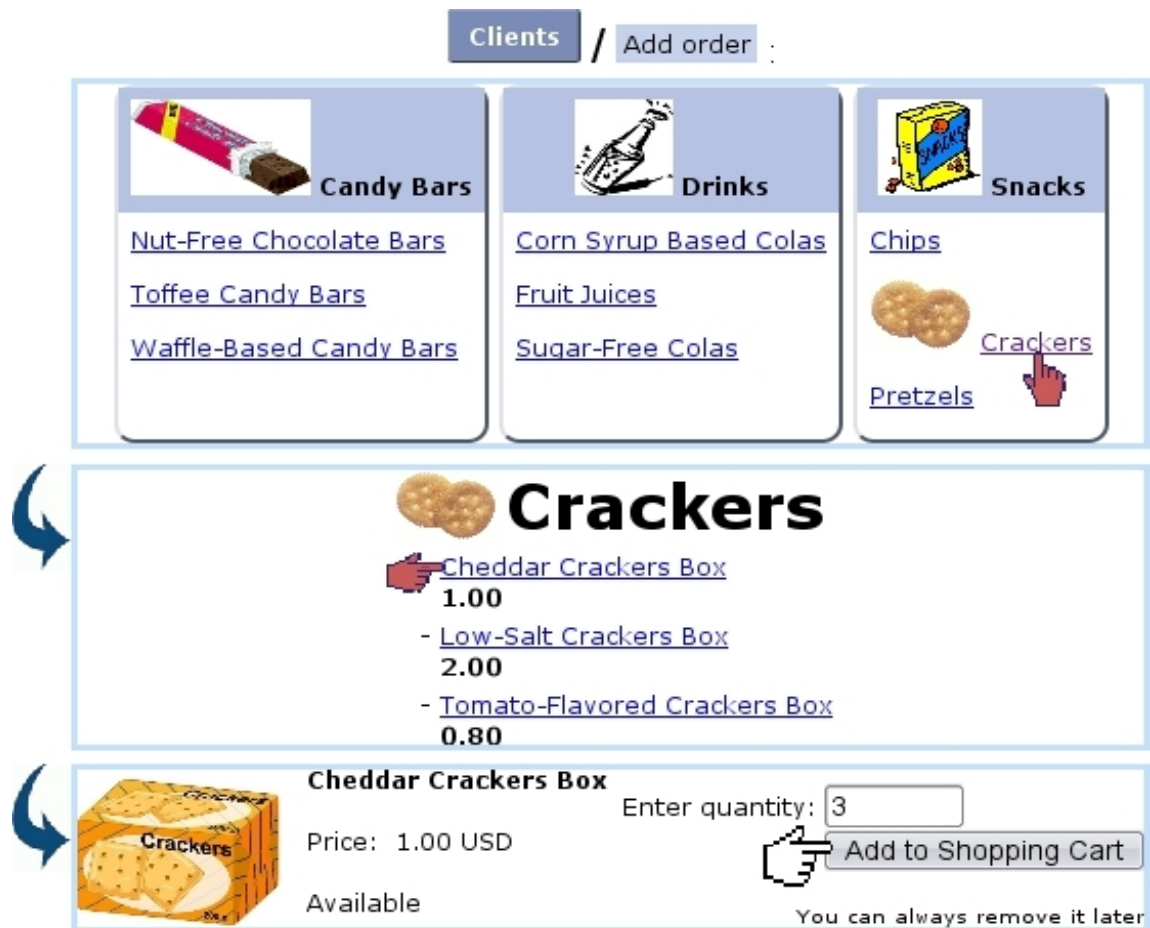


Figure 4.1: Preparing an order of 3 *Cheddar Crackers Boxes*.

This choosing process is summed up on Fig.4.1.

These pictures have been chosen while creating/modifying the article type (3.1.2.1/3.2.2.1), category (3.1.2.2/3.2.2.1) and article (3.1.1/3.2.1.1).

Validating via **Add to Shopping Cart** then leads to the *Shopping Cart Page* (Fig.4.2). There, you can either **Choose other articles** or directly **Proceed to checkout**. You can also change an article's quantity (putting it to zero will remove it from the cart).

Proceeding to checkout will finally bring you to a page where you select the ordering client by looking for her/him with a fill-in field or alphabetical click list. Once your client is chosen, for instance John Smith, the *Make Order Page* is next.





Figure 4.2: The *Shopping Cart Page*, showing that 3 *Cheddar Crackers Boxes* are currently in the shopping cart.



### *Making ordering easier*

- **Various layout/quantity options for ordering (3.3.1.3) can be set during article configuration ;**
- If some articles will never have to be ordered anyway, they can be hidden from the order screen (as seen in the middle of Fig.4.1) by setting, on the *Create/Modify Article Page* (3.1/3.2.1.1), the 'Order article:' menu to 'Not Orderable' ;
- If a whole article type contains not-orderable articles, it can be fully hidden from the Order context by setting its visibility to None (3.3.3.1) ;
- To restrain ordering according to users, set accordingly the 'Article ordering level:' menus for the related category (3.3.4.2.1) and user (9.17) ;
- To make the ordering of single/multiple articles quicker and less prone to mistakes, fine-tune the ordering quantity settings for the related category (3.3.4.2.3).

## 4.1.2 The *Make Order Page*

This page, illustrated on Fig.4.3, allows you mainly to verify every information necessary to the order before completing and, if needed, modify some.

[Proceed to checkout](#) /

[Client Search] **Smith John** :

[Proceed with next step](#) :

---

### Make order

Order date:  -  -

Salesperson:

Title :

Name \* :

First name :

Address :

Zip code \* / City :

Country \* :

Phone / Office :

Mobile / Fax :

E-mail :

Username :

(\*) required

---

Delivery method:

---

Payment method:

---

Invoice to:  [Change...](#)

Invoice delivery method:

[Proceed with next step](#) [Cancel](#)

### Make order

Order date: 29/5/2010

Salesman: Dick

Mr  
Smith  
John  
12 Orange Road  
90000 Los Angeles  
USA  
Phone: 555 1234  
E-mail: john.smith@mailserv.com

---

3 Cheddar Crackers Box  
Crackers  
**Price: 1.00 USD**  
**Total: 3.00 USD (VAT incl.)**

---

Delivery method: Pick up order at shop

---

Payment method: Pay by credit card

---

Invoice to:

Invoice delivery method:

Send confirmation email to client

[Make order](#) [Cancel](#)

Figure 4.3: (Left :) The *Make Order Page*, enabling to modify the order's details ; (Right :) last screen before final order validation.

First, the order day is set to the current day but can be modified. The salesperson's name, if any, can be picked (9.6).

The client's general information appears already filled-in, as it has been defined during her/his creation (2.1) ; below is the list of ordered items. The delivery part then lists, for each item, the article delivery method and the delivery address to fill in. Then, the payment method.



### *Successful order registering requires :*

- at least one article delivery method (4.5.1) ;
- at least one payment method (6.4.1) ;
- this article delivery method must be supported by this payment method (6.4.1.1) ;
- at least one invoice delivery method (5.4.4).

Finally, to whom the invoice will be named (by default, the ordering client, but it can be **Change** 'd) and the client's billing method, by default set to the one that is defined on her/his profile.

Once everything is correctly set, click on **Proceed with next step** : this will lead to a page letting you check out the order's details before final validation, done by **Make order** (Fig.4.3).

Finally, next screen as displayed at Fig.4.4 shows if order has been successfully registered and, if yes, the order number (see below). It also shows as a reminder if items have to be supplied (4.4.3).

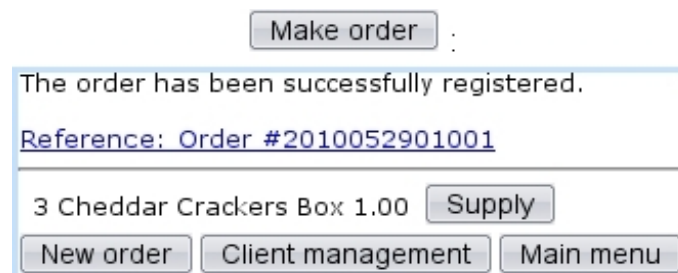
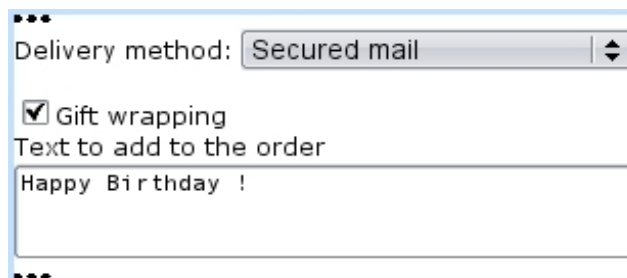


Figure 4.4: Screen confirming that order has been registered.

### 4.1.3 Gift wrapping

If the 'Gift wrapping' option has been enabled at the *Merchant Configuration Page* (9.1.5), the *Make Order Page* will provide the following, allowing to add a personalized text to the order :



#### 4.1.4 Adding an order attribute



User rights for order attribute creation/deletion can be set up either at the *Modify User Page (Fig.9.17)* or the *User Right Page (11.2)* under the element

#### Order attribute management

Similarly as for variable detail keys concerning articles (3.5.2.3), it is possible, as described in Fig.4.5, to create a field that will be used, while making the order, to add further information.

Clients / Personalization / Order attributes / Add new order attribute :

### Add order attribute

Attribute type: REFERENCE

In client shop:  Yes  No

Optional:  Yes  No

Validation script: --- None ---

Language **English**:

Attribute name: Comment

...

Add

[Make Order Page]

### Make order

Order date: 28 - 1 - 2011

Comment \* : client's 1st order

Salesperson: Dick

...

Figure 4.5: Adding an order attribute that will be an optional field dedicated to leave a small comment.

It is to note that a given order attribute aims to particularize that order itself, while a variable detail key aims to particularize the ordered *article(s)*.

#### 4.1.5 Order statuses



Order statuses that you want to be supported are chosen at the *Merchant Configuration Page (9.1.5)*. Below are listed all of them :

- In progress : the invoice for this order has not been created yet (this is of course the default status for a newly-made order) : it can be seen for the order featured on Fig.4.6 ;
- Available ;
- Delivered ;
- Completed : the payment for this order has been registered (5.6.2) ;
- Canceled : the order has been canceled voluntarily (4.4.2) ;
- In suspense ;
- Invoiced : the invoice for this order has been created ; it shifts to 'Invoice (paid)' once payment has been registered.

#### 4.1.6 The order number

As seen in Fig.4.4, order numbers are generated by pasting the current year, month and day, and a five-digit number aimed to differentiate between orders created on a same day.

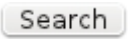
## 4.2 Searching orders

A search tool makes it simple to find any order by means of various information. To get to the *Search Order Page*, follow  / .

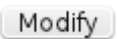
On subsequent page, as shows Fig.4.6, various search criteria can be inputed :

- an order number (4.1.6), or part thereof ;
- an article ;
- a category ;
- the order's status (4.1.5) ;
- who registered it (user or salesperson).

Through the 'Display:' menu, result orders can be narrowed by those which have already been invoiced.

Once all relevant information has been given, search is run by clicking on . Then will be displayed a list of orders sorted by date, order number, client (as a click-link to that client's *Client Management Page*), status.

Each one of the listed order numbers is a click-link to the *Order Details Page*, whose details are cleared up below.

Also, each of the orders, whatever its status is, can be modified thanks to , leading to the *Modify Order Page*, whose details are explained below at 4.4.1.

Orders :

**Search orders**

Numbers:  Status:  Registered by:

Article:  Salesperson:

Category:  Display:

---

1 order found


Date	Order	Client	Username	Salesperson	Amount	Status	
29/5/2010	<a href="#">2010052901001</a>	<a href="#">Smith John</a>	Smith.John	Dick	3.00	In progress	<input type="button" value="Modify"/>

Figure 4.6: An example of order search.

### 4.3 The *Order Details Page*

This page, shown at Fig.4.7 is accessed in whatever context where an order number appears as a click-link, for instance after an order search (4.2) or when checking the stock situation of an article (3.6.5.1). It lists every useful information to the order it concerns :

- the date at which this order has been done ;
- the number assessed to it (4.1.6) ;
- its status (4.1.5) ;
- the payment status (5.6.1) ;
- the payment method (6.4.1) ;
- the delivery method (4.5) ;
- the client's general information : name, address,... ;
- the list of articles this order holds, each one of these as a click-link to its *View Article Page*.



*If this order has already been invoiced (5.1.1), the related invoice(s) can be directly accessed through .*

Eponymous buttons also allows to modify (4.4.1) or cancel (4.4.2) this order.

Finally, this page provides a  button which enables to take ordered items from stock, provided that these items are stock-supported (3.3.4.3).

[2010052901001](#) :

**Order details**  

<b>Order date:</b>	29/5/2010	<b>Username :</b>	Smith.John
<b>Order number:</b>	2010052901001	<b>Title :</b>	Mr
<b>Order status:</b>	In progress	<b>Name :</b>	Smith John
<b>Payment status:</b>	In progress	<b>Address :</b>	12 Orange Road 90000 Los Angeles USA
<b>Registered by:</b>	Richard Malone	<b>Phone :</b>	555 1234
<b>Posting date:</b>	29/5/2010 11:05	<b>E-mail :</b>	<a href="mailto:john.smith@mailserv.com">john.smith@mailserv.com</a>
<b>Register address:</b>	10.1.1.254	<b>Credit control class :</b>	None
<b>Salesperson:</b>	Dick		
<b>Delivery method:</b>	Pick up order at shop		
<b>Payment method:</b>	Pay by credit card		
<b>Billing method:</b>	Send bill by mail		

Article	Qty	Unit price	Total	VAT	Status	Salesperson
<a href="#">Cracker Box</a>	3	1.00	3.00	(6.00% VAT incl.)	Available <take from order>	<input type="button" value="Supply"/>

**Total (USD) 3.00 (VAT incl.)**

Figure 4.7: The *Order Details Page*.

## 4.4 Order follow-up

All operations related to order management are described below.

### 4.4.1 Modifying an order

Sometimes, some order information such as order date, payment method, delivery method,... has to be modified : this is the *Modify Order Page's* goal as featured on Fig.4.8, which is accessed through the  button as found at an *Order Details Page* (4.3).

### 4.4.2 Canceling an order

Should a client unexpectedly cancel an order she/he made, this is done through , as available at the *Order Details Page* (4.3), for instance after an order search. This option is not available in the case of a subscription that already began.

If an order to be canceled had been already invoiced (5.1.1) , the following prompt appears, enabling to also cancel related invoice :


### Modify order

Order date:	<input type="text" value="29"/> - <input type="text" value="5"/> - <input type="text" value="2010"/>	Username:	Smith.John
Order number:	<input type="text" value="2010052901001"/>	Title:	Mr
Status:	In progress	Name:	Smith John
Owned by:	<input type="text" value="Dick"/>	Address:	12 Orange Road 90000 Los Angeles USA
Salesman:	<input type="text" value="Dick"/>	Phone:	555 1234
Delivery method:	<input type="text" value="Pick up order at shop"/>	E-mail:	<a href="mailto:john.smith@mailserv.com">john.smith@mailserv.com</a>
SLA:			
Name *:	<input type="text"/>		
...			
Payment method:	<input type="text" value="Pay by credit card"/>		
Payment status:	In progress		
Invoices to:	Smith John (Smith.John) <input type="button" value="Change..."/>		
Billing method:	<input type="text" value="Send bill by mail"/>		
	<input type="text" value="3"/> * Cheddar Crackers Box 1.00 3.00 (6.00% tax incl.)	<input type="text" value="Ordered"/>	<input type="text" value="Dick"/>
(*) Choose 0 as quantity to delete an article from the order			
<input type="button" value="Modify"/>			

Choose an article to add to order:

<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	(6.00% tax incl.)	<input type="text" value="Available"/>	<input type="button" value="Add article"/>
--------------------------------	-----------------------------------	-----------------------------------	-------------------	--	--

Figure 4.8: The *Modify Order Page*, with a multitude of choices for modifications.

 Are you sure you want to cancel this order (you may give a reason) ?

Reason:

Cancel the following invoices:

**2011021601013** 16/02/2011  
Chunky Choc Bar 150.00 150.00 USD



### 4.4.3 Supplying items



The  button is only available if the ordered article has been associated with a stock article (3.10).

At the end of an order (as seen on Fig.4.4) (or from the *Order Details Page*), click on  ; then displays what is shown at Fig.4.9 : three items (*Cheddar Crackers Boxes*) from the stock location they are at (here 'Main Warehouse') are to be chosen. Click on  at the bottom of the page when done.

[Successful Order Screen or Order Details Page]  :

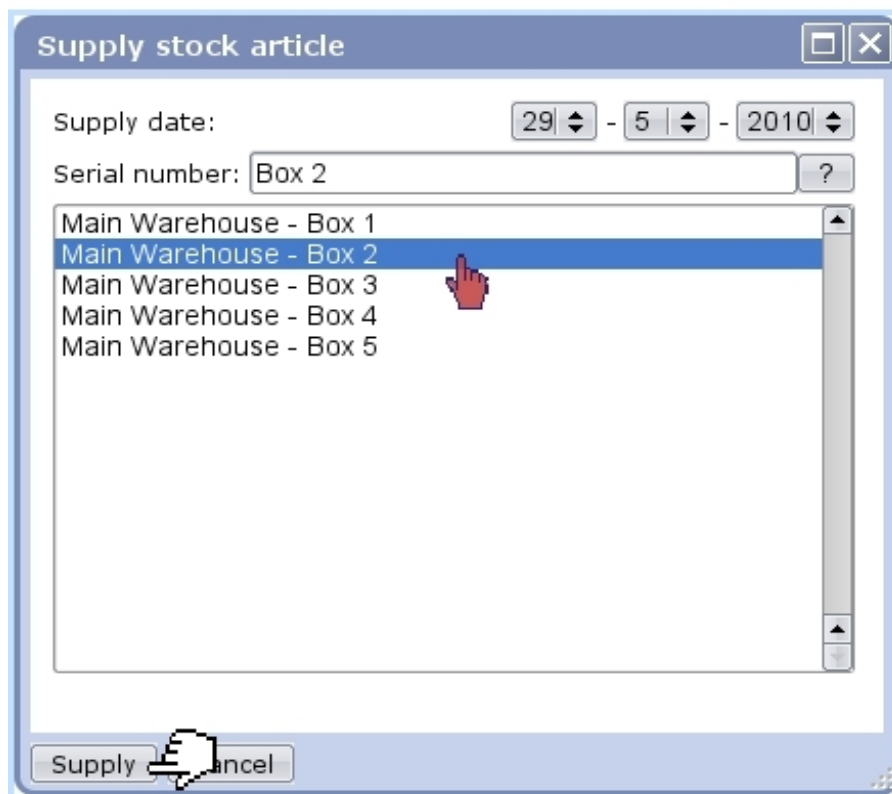


Figure 4.9: Picking stock items from their location to fulfill the order.

The *Order Details Page* finally features what is featured on Fig.4.10.

2010052901001 :

Article	Serial number	Document	Date	User	Operation	Status	
Cheddar Crackers Box	<a href="#">Box 2</a>	<a href="#">REFC9876</a>	29/5/2010 11:11:36	Jack Jones	delivery	sold	<input type="button" value="Return"/>
Cheddar Crackers Box	<a href="#">Box 3</a>	<a href="#">REFC9876</a>	29/5/2010 11:11:30	Jack Jones	delivery	sold	<input type="button" value="Return"/>
Cheddar Crackers Box	<a href="#">Box 4</a>	<a href="#">REFC9876</a>	29/5/2010 11:11:40	Jack Jones	delivery	sold	<input type="button" value="Return"/>

Figure 4.10: The *Order Details Page*, now showing the stock items that have been taken out of stock for this order.

## 4.5 Article delivery management



*User rights for article delivery management (creating, modifying, sets,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Delivery management

Well-defined article delivery methods for every need is a must ; Blue Chameleon allows to define as many article delivery methods as you wish, based upon four types : deliver order by mail, pick up order at shop, contact the client if order is ready, or none at all (which is the default type).

For instance, it is possible to create a 'pick up order at shop' delivery method for every sale outlet (9.2) your company owns ; for mail orders, different shipping companies could be handled as also the delivery costs.

Delivery methods for invoices and reminders are explained at 5.4.4.

### 4.5.1 Managing article delivery methods

The  button, as accessible via **General** / **Miscellaneous** / **Delivery methods**, leads to a page for which an example is shown at Fig.4.11.

There, for instance, a delivery method for orders to be picked at a certain shop is defined ; the delivery type 'Pick up order at shop' is selected, and a delivery method label (which will be the name through which this delivery method appears) is filled in.

At the bottom the page, the new delivery method can be assessed a status : visible, hidden in front-office and hidden.

General / Misc / Delivery methods / Add new article delivery method :

### Add delivery method

Leave out a text field to choose the default label.

Delivery type:

Delivery costs:

Language **English**:

Delivery method label:

Description:

...

Status:

External account:

Credit note account:

Figure 4.11: Adding a delivery method for orders that will be picked directly at a store.

Finally, a default or specific 'delivery' external account (6.1.1) and a credit note account (6.2.2) are to be associated with the new delivery method.

The page accessed via the path written above lists all created methods, and each of them can be updated or deleted thanks to  and . Clicking on the method's name shows its details.

#### 4.5.1.1 Delivery costs

In the above example, picking the order at shop does not lead to delivery costs ; for mail orders, on the other hand (as for any undefined-type delivery method with costs), delivery costs have to be defined. Blue Chameleon provides the handling of delivery costs, whenever these depend or do not depend on the total price of what has been ordered. While on the delivery method creation page, clicking on 'Delivery costs:'  leads to a page where a number of conditions can be given for this aim.

For instance, Fig.4.12 shows the process if we simply wish to define a delivery method that costs 3 whatever the total price of the order is.

Add new article delivery method :

Delivery type:

Delivery costs:

Language **English**:

Delivery method label:

Description:

...

### Modify delivery cost list

Cost must be different of zero or it won't be registered. If *Max* should be infinite, set it to a lower value than *Min*. If there is no condition, *Min* and *Max* are ignored.

Number to add:

Condition	Min	Max	Cost	Tax USA	[All tax categories and codes]	Delete #1
<input type="text" value="None"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="3.00"/>	USD	<input type="text" value="VAT 6% (6.00 %)"/>	<input type="button" value="Delete #1"/>

Figure 4.12: Adding a mail delivery method that always costs 3 per sending.

Just one condition is added, then, on the appearing line **Condition** is set to 'None' and **Cost** is set to 3. Taxes are defined for this delivery method cost, featuring as many tax categories (6.3.1) and the corresponding tax codes (6.3.2) as previously defined.

Now, we want for example to define a delivery method that :

- has a basis price of 3 ;
- costs 8 if order price is below 10 ;
- 16 if order price is between 10 and 20 ;
- 24 if order price is above 20.

As Fig.4.13 shows :

- four conditions are ed ;
- the first (fixed cost) is set as above, i.e. with the condition menu set to 'None' while the three other menus are set to 'Total price' ;
- for these three other conditions, **Min** and **Max** fields set accordingly to the price limits defined above ;
- for the last line, **Max** is set to 0 to mean that there is no upper limit ;
- finally, the **Cost** fields are filled with the 8, 16 and 24 costs.

The details of this method then appear clearly when it is viewed, as shows Fig.4.14.

[Add new article delivery method](#) :

Delivery type:

Delivery costs:

Language **English**:

Delivery method label:

Description:

...

---

Number to add:

Condition	Min	Max	Cost	Tax USA	[All tax categories and codes]	
<input type="text" value="None"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="3"/>	USD <input type="text" value="VAT 6% (6.00 %)"/>		<input type="button" value="Delete #1"/>
<input type="text" value="Total Price"/>	<input type="text" value="0.00"/>	<input type="text" value="10"/>	<input type="text" value="8"/>	USD <input type="text" value="VAT 6% (6.00 %)"/>	...	<input type="button" value="Delete #2"/>
<input type="text" value="Total Price"/>	<input type="text" value="10"/>	<input type="text" value="20"/>	<input type="text" value="16"/>	USD <input type="text" value="VAT 6% (6.00 %)"/>	...	<input type="button" value="Delete #3"/>
<input type="text" value="Total Price"/>	<input type="text" value="20"/>	<input type="text" value="0.00"/>	<input type="text" value="24"/>	USD <input type="text" value="VAT 6% (6.00 %)"/>	...	<input type="button" value="Delete #4"/>

Figure 4.13: Adding a mail delivery method whose costs depend on the order's amount.

[Delivery methods](#) / [VERY Secured mail](#) :

**View delivery method**

**Delivery Type:** Deliver order by mail

**Delivery costs:** +3.00 USD ( USA: 6.00% VAT incl. , EU: 15.00% VAT incl. , Rest of the world: VAT incl.)  
 +8.00 USD ( USA: 6.00% VAT incl. , EU: 15.00% VAT incl. , Rest of the world: VAT incl.) ,  
 if **Total Price** between **0.00** and **10.00**  
 +16.00 USD ( USA: 6.00% VAT incl. , EU: 15.00% VAT incl. , Rest of the world: VAT incl.) ,  
 if **Total Price** between **10.00** and **20.00**  
 +24.00 USD ( USA: 6.00% VAT incl. , EU: 15.00% VAT incl. , Rest of the world: VAT incl.) ,  
 if **Total Price** equal or more than **20.00**

**Language English:**

**Delivery method label:** VERY Secured mail

**Description:** For very special orders.

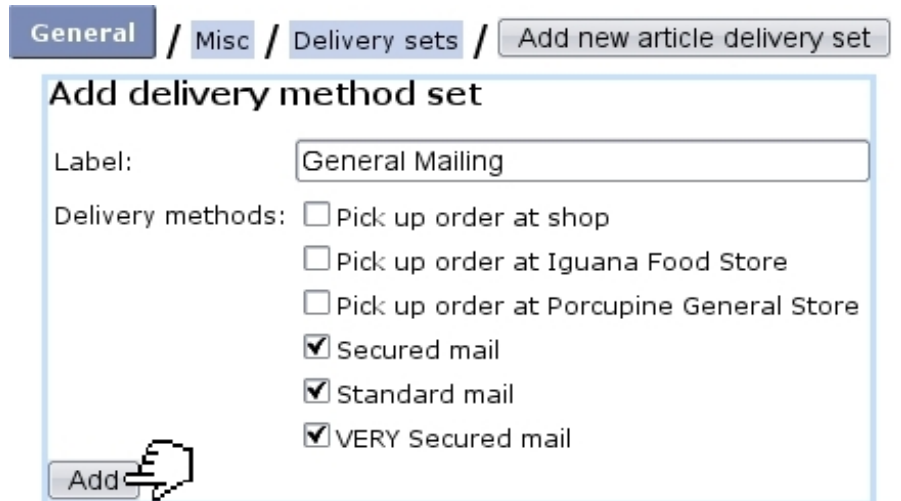
Figure 4.14: The cost details for 'VERY Secured mail' article delivery method.

## 4.5.2 Creating and modifying delivery methods sets

Delivery method sets are used to gather (article only) delivery methods and are accessed via [Miscellaneous](#) / [Delivery sets](#) ; for them to be defined, they have to be enabled while

at the *Merchant Configuration Page* (9.1.5). The creation of a method set includes a label, i.e. a name and the delivery methods it holds by ticking boxes.

An example is displayed at Fig.4.15.



The screenshot shows a web interface for configuring delivery methods. At the top, there are navigation tabs: 'General' (selected), 'Misc', 'Delivery sets', and 'Add new article delivery set'. Below this is a form titled 'Add delivery method set'. The form has a 'Label:' field containing 'General Mailing'. Under 'Delivery methods:', there are six checkboxes: 'Pick up order at shop' (unchecked), 'Pick up order at Iguana Food Store' (unchecked), 'Pick up order at Porcupine General Store' (unchecked), 'Secured mail' (checked), 'Standard mail' (checked), and 'VERY Secured mail' (checked). At the bottom left of the form is an 'Add' button with a hand cursor icon.

Figure 4.15: Defining a delivery method set grouping all delivery-by-mail methods.

## 4.6 Using the cash register

Blue Chameleon allows one or several virtual cash register(s) to be attached to a particular shop (9.2). Created in the way described at 9.2.1, they can be assessed various payment (6.4.1) and billing (5.4.4) methods.

A sale through such a cash register can be recorded via **Clients** / **Shop sale**, where a list of shops with associated cash registers is proposed. As detailed on Fig.4.16, different options are possible on the then displaying *Shop Sale Page*.

The selecting of article(s) to be sold and buying client as cleared up below, can be done in no particular sequence.

### 4.6.1 Selecting an article

Fig.4.17 shows how to select an article for a shop sale. Search criteria include a full or partial article name as well as the related type, category and status.

Clients / 
 Shop sale / 
 Iguana Food Store - CR 1 :

**Iguana Food Store - CR 1**

Article  Add Search article Article return

<span style="background-color: #d9e1f2; padding: 2px 5px;">Search client</span> <span style="margin-left: 10px;">Default client</span>	<p><b>Sale</b></p> <p>Salesperson: <span style="border: 1px solid #ccc; padding: 2px 5px;">Dick</span> <span style="font-size: 0.8em;">▾ ▹</span></p> <p><b>Delivery</b></p> <p>Delivery method: <span style="border: 1px solid #ccc; padding: 2px 5px;">Pick up order at Iguana Food Store</span> <span style="font-size: 0.8em;">▾ ▹</span></p> <p><b>Payment</b></p> <p>Payment method: <span style="border: 1px solid #ccc; padding: 2px 5px;">Cash payment</span> <span style="font-size: 0.8em;">▾ ▹</span></p> <p><b>Invoicing</b></p> <p>Invoice delivery method : <span style="border: 1px solid #ccc; padding: 2px 5px;">&lt;None&gt;</span> <span style="font-size: 0.8em;">▾ ▹</span></p>
--	---

Figure 4.16: The *Shop Sale Page*.

*If article is stock-supported (3.3.4.3) :*

- the 'Code:' (3.6.1.4) field may also be used ;
- its serial number will have to be inputed, for instance :

The article **Cheddar Crackers Box** requires a serial number.

Serial number:  Select

The quantity of a non-stock-supported article can be adjusted thanks to the -, + buttons ; for that matter, the latter will have no effect on an article which related category is set with 'single occurrence of article with a quantity of 1' (3.3.4.2.3).

Any article can be removed by pressing - as many times as necessary to put its quantity to zero, whereupon it will disappear from the list.

Once done, another article can be added again via the same process.

It is to note that the 'Article' field as seen on the *Shop Sale Page* (Fig.4.16) can also be used to input directly a serial number.

If not already done, a client has to be selected (4.6.2) in order to conclude the sale (4.6.3).

[Shop Sale Page]  :

Search article
□ ×

### Search articles

Article name: <input style="width: 90%;" type="text" value="6-Pack"/>	Code: <input style="width: 90%;" type="text"/>
Article type: <input style="width: 90%;" type="text" value="&lt;All types&gt;"/>	Status: <input style="width: 90%;" type="text" value="&lt;All&gt;"/>
Category: <input style="width: 90%;" type="text" value="&lt;All categories&gt;"/>	

---

Article	Category	Price
<a href="#">6-Pack</a>	Sodas	3.00 USD

<b>Sale</b>	
Salesperson:	<input style="width: 90%;" type="text" value="Dick"/>
<b>Delivery</b>	
Delivery method:	<input style="width: 90%;" type="text" value="Pick up order at Iguana Food Store"/>
<b>Payment</b>	
Payment method:	<input style="width: 90%;" type="text" value="Cash payment"/>
<b>Invoicing</b>	
Invoice delivery method :	<input style="width: 90%;" type="text" value="&lt;None&gt;"/>

Article	Category	Serial number	Quantity	Unit price	Total price	
6-Pack	Drinks/ Sodas		1	3.00 USD	3.00 USD	- +
Total 20.00%:					3.00 USD	
<b>Total to pay :</b>			<b>1</b>		<b>3.00 USD</b>	

Figure 4.17: Selecting an article for a shop sale.



[Shop Sale Page]  / [Client Search] [Bauer Kim](#) :

Client		Sale				
Username :	Bauer.Kim	Salesperson:	<input type="text" value="Dick"/>			
Title :	Mrs	<b>Delivery</b>				
Name :	Bauer Kim	Delivery method:	<input type="text" value="Pick up order at Iguana Food Store"/>			
Address :	23 Palmetto Drive	<b>Payment</b>				
	90000 Los Angeles	Payment method:	<input type="text" value="Cash payment"/>			
	USA	<b>Invoicing</b>				
Phone :	555 4525	Invoice delivery method :	<input type="text" value="&lt;None&gt;"/>			
E-mail :	<a href="mailto:kim.bauer@mailserv.com">kim.bauer@mailserv.com</a>					
Credit control class :	None					
Billing :	<input type="text" value="First reminder"/>					
<input type="button" value="Search client"/>		<input type="button" value="Default client"/>				
<input type="button" value="Client management"/>						
Reference	Date	Status	Debit	Credit	Balance	To pay
<input checked="" type="checkbox"/> 2010120401002	4/12/2010	open	58.00	0.00	-58.00	<input type="text" value="58.00"/>
<b>Balance</b>					<b>-58.00</b>	<b>58.00</b>
<b>Total to be paid:</b>						<b>58.00 USD</b>
<input type="button" value="Register payment"/>						

Figure 4.18: Selecting a client for a shop sale.

## 4.6.2 Selecting a client

If a default client for this shop has been defined (9.12), it is possible to select her/him directly via the eponymous button. Otherwise, this is to be done via  ; then, what is shown on Fig.4.18 will be displayed.

At the bottom of the frame lies the list of unpaid invoices that this client has, with the possibility to select each of them in order to .

If not already done, an article has to be selected (4.6.1) in order to conclude the sale (4.6.3).

## 4.6.3 Concluding the sale

Once both a client and article(s) have been selected, the sale can be concluded as shown in Fig.4.19.

The registering process for a shop sale is detailed at the Invoices & Payments Chapter (5.6.3).

[Shop Sale Page, once client and article have been chosen] :


Client		Sale				
Username :	Bauer.Kim	Salesperson:	Dick   ⬇			
Title :	Mrs	<b>Delivery</b>				
Name :	Bauer Kim	Delivery method:	Pick up order at Iguana Food Store   ⬇			
Address :	23 Palmetto Drive	<b>Payment</b>				
	90000 Los Angeles	Payment method:	Cash payment   ⬇			
	USA	<b>Invoicing</b>				
Phone :	555 4525	Invoice delivery method :	<None>   ⬇			
E-mail :	<a href="mailto:kim.bauer@mailserv.com">kim.bauer@mailserv.com</a>					
Credit control class :	None					
Billing :	First reminder					
<input type="button" value="Search client"/> <input type="button" value="Default client"/> <input type="button" value="Client management"/>						
Article	Category	Serial number	Quantity	Unit price	Total price	
6-Pack	Drinks/ Sodas		1	3.00 USD	3.00 USD	- +
Total 20.00%:					3.00 USD	
<b>Total to pay :</b>			<b>1</b>		<b>3.00 USD</b>	
<b>[List of reminded invoices]</b>						
					<b>Total to be paid :</b>	<b>3.00 USD</b>
						 <input type="button" value="Register payment"/>

Figure 4.19: Concluding the sale by registering payment.

#### 4.6.4 Returning an item



*Returning an item from the Cash register requires physical stock management to be enabled while at the Merchant Configuration Page (9.1.4) and also unrestricted user rights for 'Stock management' (11.2).*

It may happen that an item, previously provided from stock, is returned by the client because of any reason.

The Shop Sale environment then allows to put back this item into the stock, as explained on Fig.4.20.

There :

- after a cash register is selected, the **Article return** button (as seen on Fig.4.16) is clicked ;
- the article related to the stock item to return is searched (as in Fig.4.17) ;
- the serial number of the item to return is selected ;
- the related order then displays, with possibility to either :
  - return the item into stock, along with a short description to as why ;
  - exchange (3.6.5.14) it against a similar one.

As a result, in this example, the *Stock Details Page* (3.6.5.3) for this item will then show :

Date	Operation	User	Status	Location
3/1/2011 9:25:44	return (client says it's faulty)	Jack Jones	in stock	Main Warehouse
...	...	...	...	...

[Shop Sale Page] **Article return** / [Article Search] **Gizmo** :

**Search article** □ ×

The article **Gizmo** requires a serial number.

Serial number:

List: 

- Type 240-0

**Article return**

**Order**

[Order details] [Client details]

Article	Qty	Unit price	Total VAT	Status	Salesperson
<a href="#">Gizmo</a>	1	60.00	60.00 (6.00% VAT incl.)	Ordered	<take from order>

**Total (USD) 60.00 (VAT incl.)**

**Return**


New location:

Article status:

Reason to return article:

**Exchange**

New article:



Article successfully returned into stock

Figure 4.20: Returning a previously-sold, stock-managed item.

## 4.7 Sales Statistics



User rights for viewing sales statistics can be set up either at the *Modify User Page* (Fig.9.17) or the *User Right Page* (11.2) under the element

### Sales management

Blue Chameleon also allows you to get a statistical view of your sales through time, via **Clients** / **Sales**. Statistics can be processed and displayed in a monthly or yearly way, with two kinds of graphs, number of orders (Fig.4.21) and turnover (Fig.4.22) and two kinds of tables, overview (Fig.4.23) and order details (Fig.4.24).

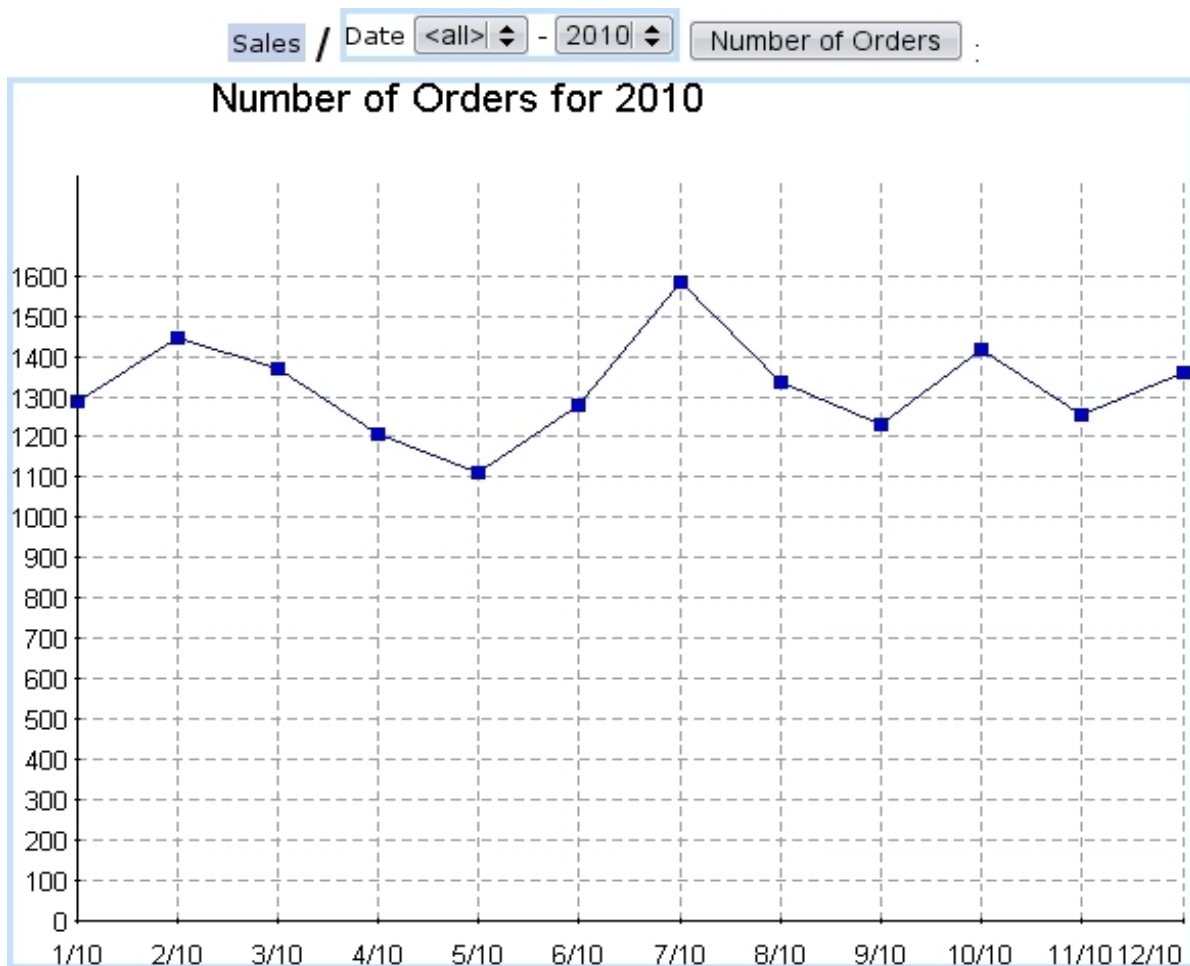


Figure 4.21: Graph showing an example of order evolution, during one year.

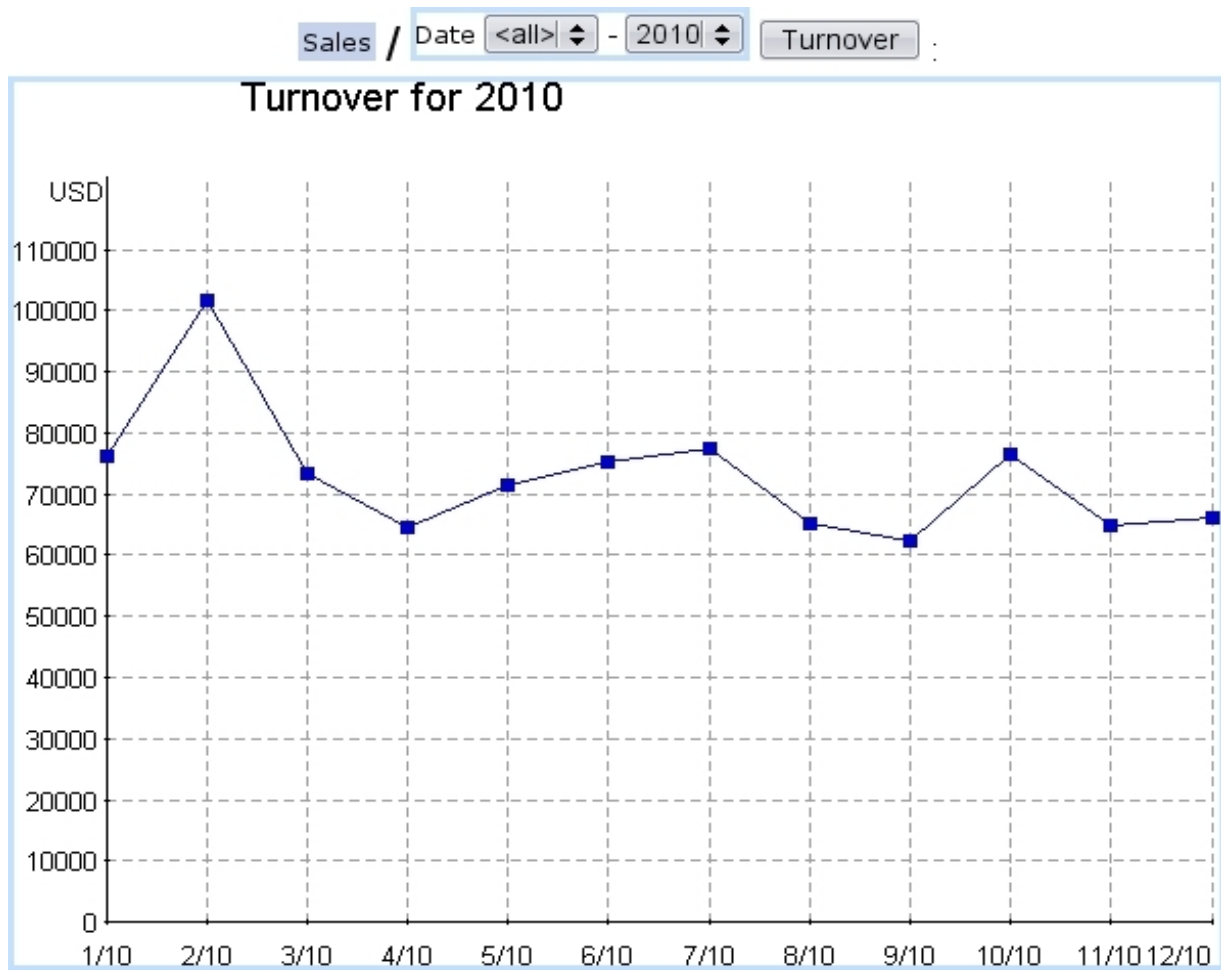


Figure 4.22: Graph showing an example of turnover evolution, during one year.

Sales / Date <all> - 2010 Overview

Overview for 2010			
Period	Orders	Clients	Turnover (USD)
<a href="#">1/2010</a>	1289	793	76126.78
<a href="#">2/2010</a>	1445	861	101813.89
<a href="#">3/2010</a>	1367	842	73222.30
<a href="#">4/2010</a>	1207	726	64456.71
<a href="#">5/2010</a>	1113	700	71570.21
<a href="#">6/2010</a>	1280	835	75289.63
<a href="#">7/2010</a>	1585	1066	77607.30
<a href="#">8/2010</a>	1335	770	65136.12
<a href="#">9/2010</a>	1233	733	62408.70
<a href="#">10/2010</a>	1417	850	76574.94
<a href="#">11/2010</a>	1253	727	64762.20
<a href="#">12/2010</a>	1359	769	65980.63
<b>Total</b>	<b>15883</b>	<b>9672</b>	<b>874949.43</b>

Figure 4.23: Table showing example data of turnover evolution, during one year.

Sales / Date <all> - 2010 Details

Details for 2010								
Period	In progress	Available	Delivered	Completed	Canceled	In suspense	Invoiced	Total orders
<a href="#">1/2010</a>	251	0	0	16	70	0	1022	1359
<a href="#">2/2010</a>	287	0	0	22	83	0	1136	1528
<a href="#">3/2010</a>	293	0	0	19	90	0	1055	1457
<a href="#">4/2010</a>	217	0	0	12	78	0	978	1285
<a href="#">5/2010</a>	181	0	0	26	74	0	906	1187
<a href="#">6/2010</a>	261	0	0	25	80	0	994	1360
<a href="#">7/2010</a>	266	0	0	15	73	0	1304	1658
<a href="#">8/2010</a>	329	0	0	17	71	0	989	1406
<a href="#">9/2010</a>	252	0	0	11	79	0	970	1312
<a href="#">10/2010</a>	368	0	0	16	89	0	1033	1506
<a href="#">11/2010</a>	349	0	0	18	70	0	886	1323
<a href="#">12/2010</a>	435	0	0	18	90	0	906	1449
<b>Total</b>	<b>3489</b>	<b>0</b>	<b>0</b>	<b>215</b>	<b>947</b>	<b>0</b>	<b>12179</b>	<b>16830</b>

Figure 4.24: Table showing example data of orders (broken down by order status), during one year.





# Chapter 5

## Invoices and Payments Management

Blue Chameleon has been designed to provide sure ways of managing your clients' payments ; they will be lengthfully described in this Chapter.

All commands explained in this section are accessible from the **Sales** command group.



*User rights for invoice management (creating, viewing, modifying,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Invoice management

### 5.1 Basic invoice handling

Blue Chameleon has made invoices easy and straightforward to deal with, thanks to the *Invoices Management Page*, as shown on Fig.5.1 and accessed via **Sales** / **Invoicing**.

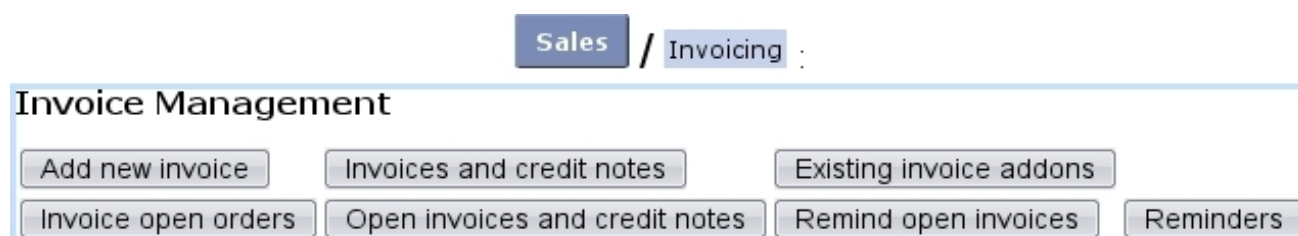


Figure 5.1: The *Invoice Management Page*, with buttons designed to accomplish any invoice-related action.

For all that follows, invoice management must be enabled while at the *Merchant Configuration Page* (9.1.6).

## 5.1.1 Invoicing an order



***Successful invoice creation requires a defined currency (9.1.8) as well as a credit control class (9.1.6).***

Just after an order has been done (4.1.1) :

- if ordered goods are *not* stock-supported (3.3.4.3), a **Invoice selected articles** button is available to create the invoice for the ordered and selected items ;
- if ordered goods are stock-supported, a **Supply** button is available to supply the goods from stock (4.4.3). If supplying was successful, a **Invoice articles 'to be invoiced'** button is available to create the invoice.

Otherwise, to create an invoice anytime :



***Summary : adding an invoice for a specific order***

1. at the *Invoices Management Page*, click on the **Add new invoice** button ;
2. specify the client related to this concluded order ;
3. on subsequent click-list of order numbers, click on the one to invoice ;
4. you are brought to the *Add New Invoice Page*, as featured on Fig.5.2 which enables to generate the invoice for that order.

Also, the open orders (waiting to be invoiced) can be displayed and then invoiced client via **Invoice open orders** (5.4.2).

This page features :

- as the client's general information (non-modifiable) ; the date and period date are set by default to the current day but can be modified ;
- an 'Export:' menu, dealing with the exporting of the invoice to the External System : 'not exported', the default choice, allows this invoice to be exported, either manually (6.1.2) or automatically (6.1.3), while the other makes the invoice 'blocked for export' ; this choice can be changed after invoice is created (5.4.1) ;
- finally, the item part allows to edit the item list, that is to say to modify quantity, delete articles or add new ones.

/ [Client Search] Smith John [2010052901001](#) :

**Add new invoice**

Username : [Smith.John](#)  
Title : Mr  
Name : Smith John  
Address : 12 Orange Road  
90000 Los Angeles  
USA  
Billing : **First reminder**  
Currency:   
Value date:  -  -   
Period date:  -  -   
Export:

Article	Quantity	Price	Total price	Total tax	VAT	Total tax incl.
<input type="text" value="Cheddar Crackers Box"/>	<input type="text" value="3"/>	<input type="text" value="1.00"/>	<input type="text" value="3.00"/>	<input type="text" value="0.17"/>	6.00 %	<input type="button" value="Delete #1"/>
<b>Total</b>			<input type="text" value="3.00"/>	<input type="text" value="0.17"/>		

Article list:

Article	Quantity	Price	Total price	Total tax	Total tax incl.
<input type="text"/>	<input type="text" value="1"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Figure 5.2: The *Add New Invoice Page* allowing to create an invoice for a given order.

### 5.1.2 Invoice number

Once successfully created, an invoice is assessed a number, corresponding to the order number (4.1.6) of the order it refers to : for instance, the new invoice as created in Fig.5.2 for order [2010052901001](#) is assessed the identifier [#2010052901001](#).

### 5.1.3 Invoice statuses

They are five :

- open : this is the default status for a newly-created invoice, and it remains so until payment has been registered (5.6.2) ;
- sent : invoice belonged to a successfully sent work set of the 'Invoice' type (5.5.6) ;
- reminded : invoice belonged to reminding procedure (5.9.2) ;
- canceled : invoice has been canceled (5.4.1) ;

- paid : invoice switches automatically to this status when payment is registered.

## 5.2 Searching invoices

Looking for already-existing invoices is made possible with an efficient search engine.

From the *Invoices Management Page* (as seen at 5.1), click on the **Invoices and credit notes** button.

Invoices and credit notes :

**Invoices and credit notes**

Date:	29   ▾ - 5   ▾ - 2010   ▾	Period:	Specified date   ▾	Registered by:	Dick   ▾ <All>   ▾
Client name pattern:	Smith	Article:	<All>	Select new articles	
Status:	<Any>   ▾	Min./Max. amount:	<input type="text"/> / <input type="text"/>	Salesperson:	<All>   ▾
Display:	Invoices   ▾	Sort:	by date   ▾	Version:	Normal version   ▾

Search

---

Add new invoice Register other credit note

1 invoice(s) found

29/5/2010 [#2010052901001](#) Invoice open [Smith John](#) Smith.John 3.00 Modify Cancel invoice Register payment Register credit note

**Total (1): 3.00**

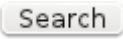

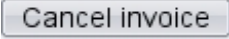
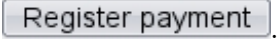
Back to menu Print version

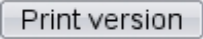
Figure 5.3: The invoice search engine and the results it displays.

Then, the subsequent page as featured at Fig.5.3 leaves you the possibility to input your search criteria :

- the date at which invoices were issued, and how far back it time ('Period:') from this date they have been ;
- registered by which user or salesperson ;
- a defined invoice status (5.1.3) ;
- a minimum amount for invoices, tax included or not ;
- concerning certain articles only, which can be selected via **Select new articles** (a pop-up window then appears where one or several categories and/or articles can be chosen : multiple choices are inputed by holding the [CTRL] key) ;
- a client name pattern ;
- various display options :

- 'Display:' normal or detailed (i.e. including article name) invoices, as well as turnover ;
- 'Sort:' by date, client or amount ;
- 'Version:' normal, print or export (see below).

Once you have given all the search information you had, click on . The results will be given as a click-list of invoice numbers. Clicking on any of these will bring you to the *View Invoice Page* (5.3). Also featured for each invoice : its status, the amount to be paid or which has been paid, the client who issued the order and a button to  invoice. Also, if available, buttons to  (see below) or .

The invoice search results as described above are obtained through 'Version:' menu's default value, 'Normal version' ; one other choice, 'Print version', displays results in a print-friendly version, without the above-said buttons. This version is also available through the  button as available at the bottom right of the page after a 'Normal version' search.

Lastly, one other choice provided by the 'Version:' menu is an 'Export version', which shows similar results as for the print version, with the addition of a downloadable .csv file of the invoice search results.

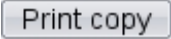
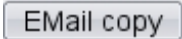
### 5.3 The *View Invoice Page*

This page, attained from an invoice search (5.2) or from any context where an invoice number can be clicked on, features the invoice's details in an exhaustive way as well as links to other information pertaining to it. See Fig.5.4 for the *View Invoice Page* pertaining to the current example.

First, the general information about this invoice is given :

- its reference ;
- the date at which it has been created ;
- its status (5.1.3) ;
- ...

The order number related to this invoice is also given as a click-link, which leads conveniently to the *Order Details Page* (4.3) for that very order. The client who made the order also appears, as a click-link to her/his *Client Management Page* (2.3).

Several buttons are there available :  generates a pre-formatted, ready-to-print PDF file of this invoice, as shown at 5.9, and it is also possible to  of this invoice. There are also two eponymous buttons that enable to modify the invoice (that is to say, to delete or add articles) or cancel it.

**Invoice**

<b>Reference:</b> 2010052901001	<b>Username :</b> <a href="#">Smith.John</a>
<b>Value date:</b> 29/5/2010	<b>Title :</b> Mr
<b>Period date:</b> 29/5/2010	<b>Name :</b> Smith John
<b>Status:</b> paid	<b>Address :</b> 12 Orange Road
<b>Order number:</b> <a href="#">2010052901001</a>	90000 Los Angeles
<b>Export:</b> not exported	USA
<b>Registered by:</b> Richard Malone	<b>Billing :</b> <span style="background-color: yellow;">First reminder</span>
<b>Registered by:</b> Richard Malone	

Article	Quantity	Price	Total price	VAT
Cheddar Crackers Box	3	1.00	3.00	6.00%
<b>Total VAT incl.</b>			<b>3.00</b>	
<b>Total VAT excl.</b>			<b>2.83</b>	
<b>Total VAT 6.00%</b>			<b>0.17</b>	

Figure 5.4: The *View Invoice Page*.

## 5.4 Invoice management through time

Invoices require rigorous and extended management functions, which Blue Chameleon of course provides.

### 5.4.1 Operations on invoices

Right after each invoice as displayed after an invoice search (5.2),  ,  ,  and  buttons are available depending on invoice status (5.1.3) and whether it has been exported (6.1.2). The following table sums up what operations can be thus done :

<i>Status (5.1.3) :</i>	<i>Operation :</i>			
	Modify	Cancel invoice	Register payment	Register credit note
open	YES*	YES*	YES	YES
sent	YES	YES	YES	YES
reminded	YES	YES	YES	YES
canceled	YES	NO	NO	NO
paid	YES	NO	NO	NO

(\*) provided that invoice has not been exported yet.

Provided that an invoice **can** be modified, then :

- if it has not been exported, the following can be modified : currency, date, period date and status. Invoice can also be blocked for export, and articles can be added or deleted ;
- if it has been exported, only period date and status can be modified.

If an invoice is canceled, the amount of the order is then transferred as credit notes (5.7). Also, an invoice can be canceled automatically when related order is canceled (4.4.2).

Credit notes can be manually registered provided that invoice has not be paid for nor canceled yet and that there is no subscription in the related order.

## 5.4.2 Orders that have not been invoiced yet

Displaying the orders that are still waiting to be invoiced is conveniently done from **Invoice open orders**, again accessible from **Invoicing**. As featured at Fig.5.5, a search can be lead with order number and/or article.

Invoice open orders :

Invoice open orders

Search order reference: 2010 Search

Search the following articles: <All>

Order	Date	Client	Username	
<a href="#">2010123101026</a>	31/12/2010	Sheldon Helen	Sheldon.Helen	Invoice
	Gizmo 60.00 1			
<a href="#">2010041101002</a>	11/4/2010	Smith John	Smith.John	Invoice
	Chunky Choc Bar 2.00 30			

Invoice all open orders

**All invoices have been successfully added.**

Figure 5.5: Displaying the uninvoiced orders for August, 2008 and invoicing them.

Search results feature a list of order numbers (leading to the *Order Details Page*, see 4.3), the date on which the order has been done, the client, and a button to **Invoice** this particular order.

Also, the  at the bottom of the page allows to create the invoices for all the displayed orders.

### 5.4.3 Invoices for which no payment has been registered yet

Unpaid invoices can be displayed thanks via  button. An illustrated example is given at 5.8 where this feature is used to reconcile invoices and payments.

### 5.4.4 Delivering invoices and reminders

The task of delivering invoices and reminders is done through delivery methods created in a similar way as those for articles (4.5.1), including charges or not. The creation pages are accessed via  and , also accessible via  /  / .

Available delivery types are now different, 'Send bill by mail' and 'Send electronic bill' for invoices and 'Send reminder by mail' for reminders. As for article delivery methods, invoice and reminder delivery methods can also be assessed a status (visible, hidden,... ) and are to be associated with a default or specific 'delivery' external account (6.1.1) and a credit note account (6.2.2).

### 5.4.5 Invoice addons

The use of those is extensively cleared up in the following.

#### 5.4.5.1 Creating an invoice add-on

Invoice addons, for a particular client can be added directly from her/his *Client Management Page* (2.3) as illustrated on Fig.5.6. They consist in, for a subscription bought by the client, to add a specific article.



*An article is featured in the 'Article list:' only if checkbox "Use for invoice addons" has been checked while creating (3.1.1) or modifying (3.2.1.1) this article.*

#### 5.4.5.2 Managing invoice addons

After one or several invoice addons have been added, they can be seen and managed through the *Invoice Management Page* via .



### Add new invoice addon

Username : Salazar.Ramon  
 Title : Mr  
 Name : Salazar Ramon  
 Address : 4, Taco Street  
 87100 Albuquerque  
 USA  
 Billing : Contentious  
 Date: 28 - 2 - 2011

---

Article list: Tomato-Flavored Crackers Box

Subscription	Article	Quantity	Unit price	Total price	Total tax	Total (tax incl.)	
2011022101009 - ...	Tomato...	50	0.80	40.00	0.06	40.00	<input type="button" value="Add"/>

[Possibility to add another article]

Figure 5.6: Creating an invoice add-on to go with a particular subscription.

**5.4.5.2.1 Validating an invoice add-on** There, as pictured in Fig.5.7, they can be search along their status (validated or not) and a  button enables to execute validation.

Invoicing / Existing invoice addons :

### View invoice addons

Status: New Registered by: <All>

Date	User	Name	Username	Order	Description	Amount	Status
28/2/2011	Jack Jones	Salazar Ramon	Salazar.Ramon	2011022101009	Tomato-...	40.00	New
<b>Total (1):</b>						<b>40.00</b>	

Invoice addon(s) successfully updated.

Figure 5.7: Validating a new invoice add-on.

**5.4.5.2.2 Canceling an invoice add-on validation** If necessary, a validated invoice can have its validation canceled via the  button as available at the bottom of the page when a search on validated invoice addons has been run, or on the *Invoice Add-On Details Page* as cleared up below.

**5.4.5.2.3 Invoice add-on details** Clicking on the date link (as for instance [28/2/2011](#) in the example featured at Fig.5.7) leads to the page shown at Fig.5.8.

There, according to the status of the invoice add-on, it is possible to perform certain actions :

- a yet non-validated add-on can be either validated or removed ;
- for an already-validated addon, the only possibility is the canceling of the validation.

[Invoice addon search] [6/11/2008](#) :

**View invoice addon details**

**Date:** 28/2/2011  
**Period date:** 28/2/2011  
**User:** Jack Jones

Name	Username	Order	Description	Quantity	Amount	Total amount	VAT	Status	Invoice
<input type="checkbox"/>	Salazar Ramon	Salazar.Ramon	2011022101009 Tomato-...	50	0.80	40.00	2.40	Validated	
<b>Total ( 1):</b>						<b>40.00</b>	<b>2.40</b>		

Figure 5.8: This page, displaying the details of an invoice add-on, allows in the case of validated addons to cancel the validation.

## 5.5 Printing, sending invoices and reminders

Blue Chameleon features the possibility to generate in a single click invoices and reminders in a custom way.

With the help of print models and work sets, the layout of an invoice or reminder can be defined as you wish while the ordered article list, client information and general formatting is entirely handled by Blue Chameleon.

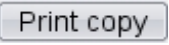
Fig.5.9 features for instance the final result of an invoice printout (as generated by clicking on the  button featured on the *View Invoice Page*, 5.3) ; there :

- top and bottom elements such as merchant logo and address, client address and footer note are handled by a "Print model" ;

- phrases to introduce and conclude the invoice are defined in a "Work set".

How these elements are set is described next.

### 5.5.1 Quick start : using default print model

Blue Chameleon comes with a default print model that allows to print invoices without having to define anything : this 'Default invoice model' is automatically launched on click of the  button.

This Default model will automatically put the following on the printout :

- your merchant address and logo (as defined in 9.1.1 - and 9.1.2 for alternative merchant addresses) in the top-left corner ;
- the client's address further down, aligned on the right ;
- below that, the date of the invoice ;
- then, the invoice number and the description of the ordered articles with their amount.

Using work sets, as described next, can now enrich this printout with custom sentences such as '*Dear Sir/Madam,...*' and '*We thank you for choosing...*'.

Of course, it is possible to create your own print models or enrich the default one with a footer (5.5.8).

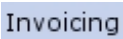
### 5.5.2 Work sets



*User rights for work sets (creating, processing, sending,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

#### **Bill set management**

Most generally, work sets are used to gather invoices and reminders, whether to be printed out or sent via email.

Work sets are managed from the page accessed via , with a set of buttons below the ones shown at 5.1 ; they are featured at Fig.5.10.

[View invoice page]  :

[Result on generated PDF] :

	Retail Food Company 41, Green Hill Road Los Angeles 90000	
		Mr Ferguson Bob 23 Namaste Street 96800 Honolulu USA
		USA, 14 January 2011
<h1>INVOICE</h1>		
Invoice nbr: 2011011401001		
Dear Sir/Madam, Please find below the item(s) you ordered :		
Description	Quantity	Unit price
Gizmo	1	60.00
Standard mail	1	8.00
		<b>Total VAT incl. (USD)</b>
We thank you for choosing Retail Food Company !		

Figure 5.9: An example of an invoice printout that uses the Default print model.

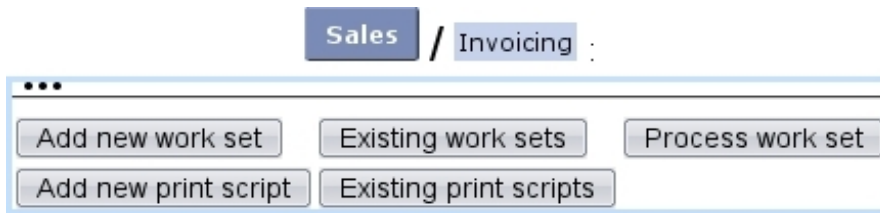


Figure 5.10: These buttons, as available on the *Invoice Management Page*, are designed to accomplish any action related to work sets.

The image shows the 'Add print set' form. At the top, there is a navigation bar with 'Sales', 'Invoicing', and 'Add new work set' buttons. The form title is 'Add print set'. The fields are as follows:

- Type: Invoice copy (dropdown)
- Content type: Individual invoices (dropdown)
- Label: Basic invoice copy (text)
- Mail title: INVOICE (text)
- Header address: Head office (dropdown)
- Mail header: (empty text area)
- Mail footer: (empty text area)
- Mail prologue: Dear Sir/Madam, Please find below the item(s) you ordered : (text)
- Mail epilogue: We thank you for choosing Retail Food Company ! (text)
- Email from: client.order@retailfc.com (text)
- Email Cc: (empty text area)
- Email subject: Your invoice (text)

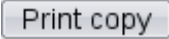
At the bottom left, there is an 'Add' button with a hand cursor icon.

Figure 5.11: Creating a 'Basic invoice copy' work set.

### 5.5.2.1 Adding and managing work sets

Fig.5.11 shows an example of a 'invoice copy' work set creation, that will be used for invoice printouts and electronic sending.

Work sets are created along several print types, ruling for which use this work set will be used for :

- mailing : this work set will not contain any invoice, and will be used only for general mailing ;
- invoice : this work set will gather invoices ;
- invoice copy ;
- reminder : this work set will gather reminded invoices ;
- reminder copy : this work set is needed when using the  button, that is available at the *View Reminder Page* (5.9.3) for a specific reminder.

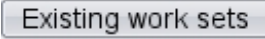
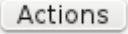
Their 'Content type:' holds three choices :

- individual invoices : for *each* invoice, *one* email/paper mail will be generated ;
- client account with invoices : all invoices related to the same client will be grouped on one email/paper mail ;
- client mail without invoices : this is the choice to make for a 'mailing' work set.

Apart from the work set's label, several fields by which to design the paper and electronic invoices/reminders can be filled :

- a general title ;
- a header address, by default set as 'Head office', corresponding to merchant's head office address (9.1.1) ; alternative merchant addresses, if defined (9.1.2), can be selected ;
- mail header and footer, left empty for print models to be used (5.5.8) ;
- the prologue and epilogue define the sentences that are to be put before and after the list of ordered articles. For that matter, the sentences as seen on Fig.5.9 were defined here.

Also, email options (email from, email CC, email subject) are featured for invoices that will be sent by mail through the  button.

Once created, work sets can be viewed via , where they can be modified and removed thanks to the eponymous buttons. The use of the  buttons is explained at 5.5.4.

### 5.5.3 Sending reminders


As how to print out invoices has been seen, the case of reminders will now be described.

For those, a 'Reminder for invoices' work set may be defined as follows :

**Sales** / **Invoicing** / **Add new work set** :

#### Add print set

Type:	<input type="text" value="Reminder"/>
Content type:	<input type="text" value="Client account with invoices"/>
Label:	<input type="text" value="Reminder for invoices"/>
Mail title:	<input type="text" value="REMINDER"/>
Header address:	<input type="text" value="Head office"/>
Mail header:	<input type="text"/>
Mail footer:	<input type="text"/>
Mail prologue:	<input type="text" value="Dear Sir/Madam,&lt;br/&gt;You still did not for pay for the following :"/>
Mail epilogue:	<input type="text" value="We would like you to fix it as you as you can."/>
Email from:	<input type="text" value="client.payments@retailfc.com"/>
Email Cc:	<input type="text"/>
Email subject:	<input type="text" value="REMINDER"/>



### 5.5.4 Processing a 'reminder' work set

Once reminders or invoices have been added to a set (for the current 'reminder' example, open invoices are added to the above-created 'Reminder for invoices' work set through a dedicated process, explained at 5.9.2), it is possible to .

This displays a clickable list of current work sets and then clicking on one brings to its *Work Set Process Page* featuring a set of buttons as shown in Fig.5.12.

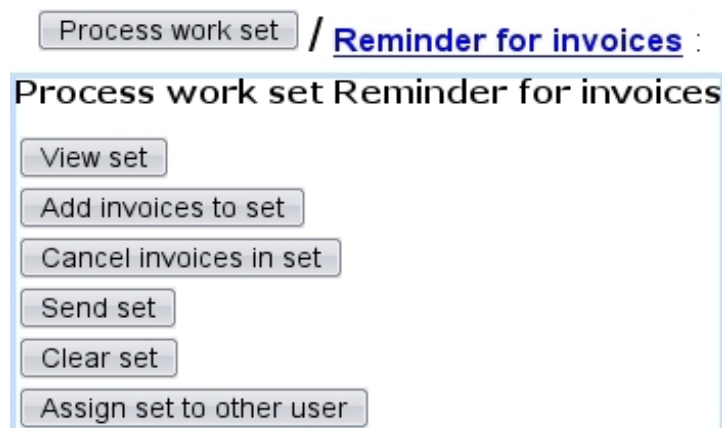


Figure 5.12: The *Work Set Process Page* is designed to accomplish actions on a particular work set.

These actions are the following :

- **View set** displays the list of invoices in this set (in this case, reminders that have been created and added through a reminding procedure as described in 5.9.2), with possibility for each of them to be **Remove**d ;
- **Add invoices to set**, through an invoice search tool, enables to add to this work set invoices, if it has not been the case already ;
- **Cancel invoices in set** allows to mass-cancel (5.4.1) invoices that have been added to this set ;
- **Send set**, whose function is explained at length at 5.5.5 below ;
- **Clear set**, which allows to remove added invoices from a yet-unsent set ;
- **Assign set to other user**, whose function is to forward this work set to another user.

### 5.5.5 Sending a reminder work set

**Send set**, in this example, begins to display the list of open invoices that have been reminded (5.9.2). Each of them can be selected or de-selected in order to be sent or not by paper mail and/or electronic mail.

The process is shown at Fig.5.13 ; upon success, for the current example, two 'Reminder for invoices' files are created :



- one 'overall' PDF 'Reminder for invoices' file, which contains formal reminders with client general information, invoice details in the template (header, footer, prologue,...) defined by this work set. This file is aimed to be printed and according to the 'Content type:' of this work set (5.5.2.1), each page will feature either one individual invoice or a client's grouped invoices ;
- one 'mainmerge' 'Reminder for invoices', which is a flat file that gathers client information and invoice amounts.

Send set :

**Send print set Reminder for invoices**

Sort:

Attached file:

---

**Send bill by mail**

<input checked="" type="checkbox"/>	Client	Username	EEmail	Invoice	Date	Amount	Status
<input checked="" type="checkbox"/>	Bauer Kim	Bauer.Kim	kim.bauer@mailserv.com	<a href="#">2010120401002</a>	4/12/2010	58.00	open

...

**[List of invoices to remind]**

...

Send paper mail  Send email

---

↓

Preparation done, 9 invoices to be treated  
Continue with initialization

↓

**Overall file [Reminder for invoices](#)** (this file remains 30 days on the server)

**Mailmerge file [Reminder for invoices](#)** (this file remains 30 days on the server)

Figure 5.13: Sending paper mail and email reminders for invoices to be reminded.

Also, the *Work Set Process Page* now displays what is shown on Fig.5.14. The link under 'Report' shows the log of the sending process, displaying successful or unsuccessful email sending, while the file under 'Files' shows the generated PDF 'Reminder for invoices' file.

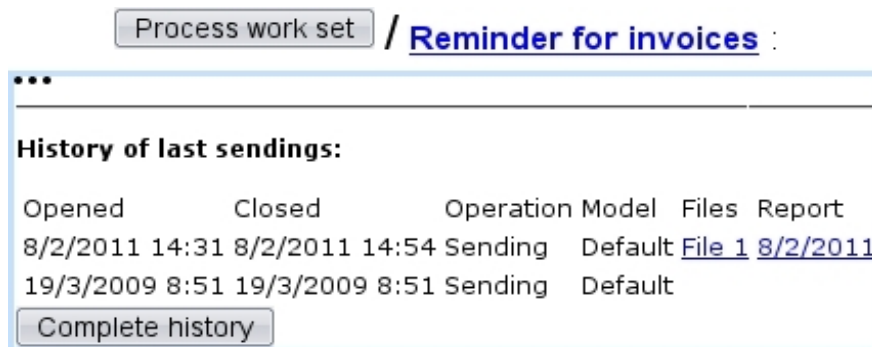
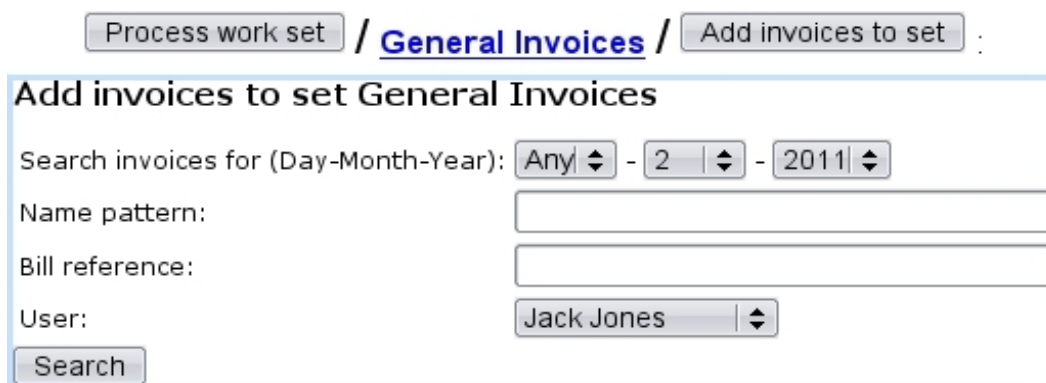


Figure 5.14: The sending of a work set is featured on its *Work Set Process Page*.

### 5.5.6 Other sets that can be created and processed

The example shown above dealt with the creation and the processing of a reminder work set. A work set with normal invoices can also be filled in a similar way through **Add invoices to set**. Invoices can be selected with date and client name filters : for instance, this will add the invoices of February, 2011 to the "General Invoices" work set, of the 'Invoice' type :



Then, all the sending process remains the same as for a reminder work set. This way, all your client's invoices can be generated easily.



**Summary : generating automatically invoices or reminders to be printed out and/or sent by mail**

- For groups of invoices, reminders or mass-mailing :
  1. Be sure an 'Invoice', 'Reminder' or 'Mailing' work set (according to the task you want to achieve) has been defined (5.5.2.1) ;
  2. then, through **Process work set**, click on the work set to process (5.5.4) ;
  3. for invoice work sets (and optionally for reminder work sets), **Add invoices to set** ;
  4. finally **Send set** (5.5.5), picking the options you wish (paper and/or electronic mails) ;
- For an individual invoice or reminder :
  1. Be sure an 'Invoice copy' or 'Reminder copy' work set has been defined ;
  2. at the corresponding *View Invoice Page* (5.3) or *View Reminder Page* (5.9.3), simply click on **Print copy** to generate the PDF file of the invoice (see example below) or reminder. A **EEmail copy** button is also available.

## 5.5.7 Print scripts management



*User rights for print script management can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

**Script management**

## 5.5.8 Print models

Print models rely on print templates (13.2) ; for instance, the 'Default invoice model' as described in 5.5.1 relies on the 'Default' print template.

This one can be modified as featured in Fig.5.15 so that the invoice printout includes a footer, for instance containing the company's VAT information and bank data.

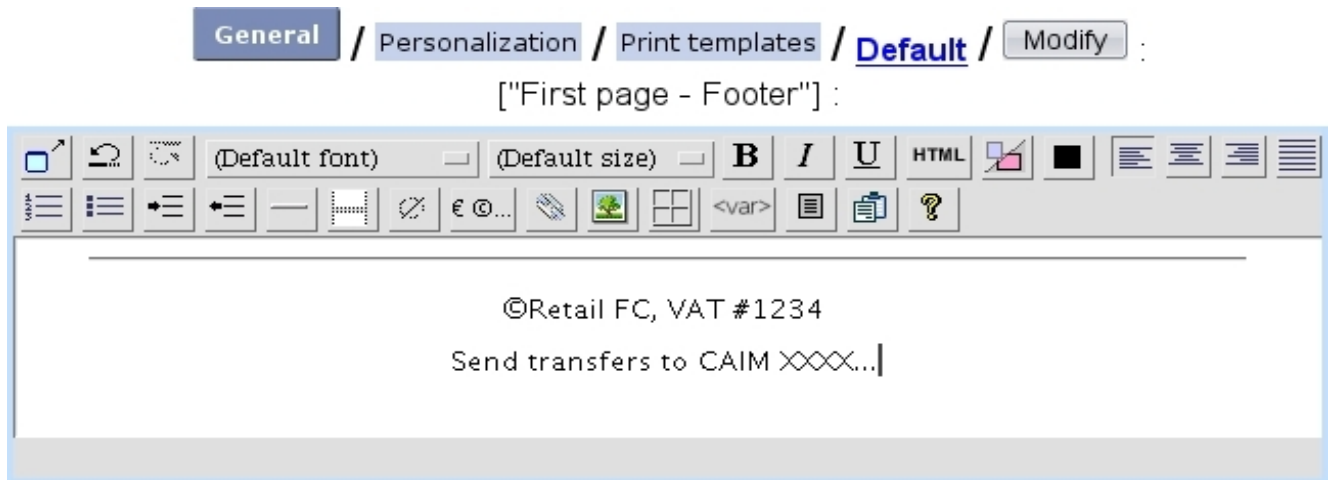


Figure 5.15: Enriching the 'Default' print template, as used by the 'Default invoice model' print model.

It is to note that, with the 'Default invoice model', no header needs to be defined, as it is already included internally. Nonetheless, it is still possible to modify the heights of the header and footer margins.

### 5.5.8.1 Defining your own print models

[In Development]

## 5.6 Client payments



*User rights for client payment management can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### **Client payment management**

Dealing with general client payment matters is an easy task thanks to the *Client Payment Management Page* (Fig.5.16), which is accessible from **Sales** / **Client payments**.

Methods by which clients can pay are defined at 6.4.1.

### 5.6.1 Payment statuses

According to the settings of 'Supported payment status:' at the *Merchant Configuration Page* (9.1.6), there are only two statuses to a client payment : 'In progress' or 'Paid'. The payment status is displayed at the *Order Details Page* (4.3) for that particular order.

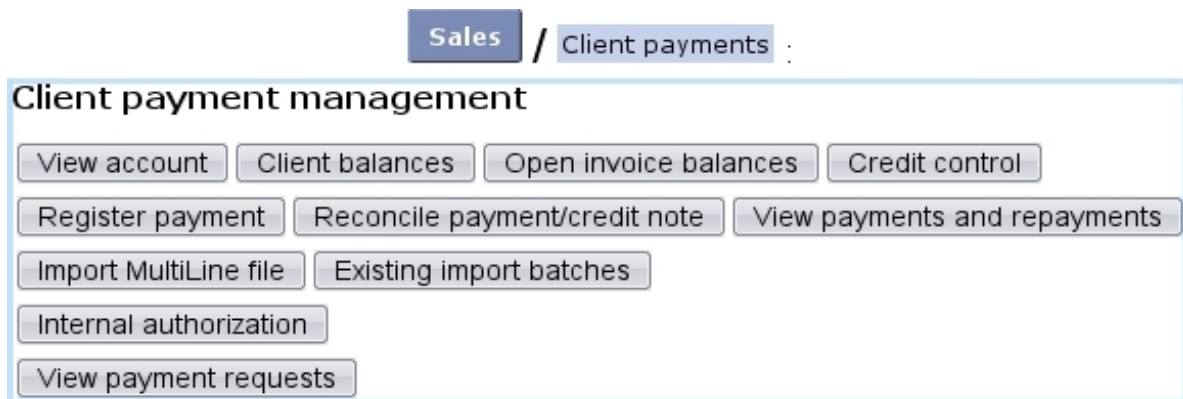


Figure 5.16: The *Client Payment Management Page*, with buttons designed to accomplish any client payment-related action.

## 5.6.2 Registering invoice payment



*Registering a client payment requires at least one defined bank account (6.2.1).*

Once payment for a specific invoice has been received, it is necessary to register it :



### *Registering a payment*

1. via **Sales** / **Client payments**, click on **Register payment**
2. after subsequent search by client (or invoice reference), on the then-displaying click-list of invoices, click on the one for which to register payment
3. you are finally brought to the *Register Invoice Payment Page* as displayed in Fig.5.17.

This page features client general information, ordered articles (these are not modifiable), and amongst other the value date (set to current day, but can be modified). The 'Amount paid:' field is always set as default to the total amount of the invoice, but in fact any amount can be registered : reconciling will then take care of regulation (5.8).

Finally clicking on **Register** marks the invoice as paid, yielding a confirmation screen.

Apart from the value date, label and amount paid, a defined bank (6.2.1) or cash-box (6.2.3) account is assessed to this payment (this 'Account:' menu only appears if several accounts are available ; if there is only one, it is implicitly chosen).

### Register invoice payment

<b>Reference:</b> 2010052901001	<b>Username:</b> Smith.John
<b>Value date:</b> 29/5/2010	<b>Title:</b> Mr
<b>Period date:</b> 29/5/2010	<b>Name:</b> Smith John
<b>Status:</b> open	<b>Address:</b> 12 Orange Road
<b>Order number:</b> <a href="#">2010052901001</a>	90000 Los Angeles
<b>Export:</b> not exported	USA
<b>Registered by:</b> Richard Malone	

Article	Quantity	Price	Total price	VAT	Total tax incl.
Cheddar Crackers Box (s/n: Box 2,Box 3,Box 4)	3	1.00	3.00	6.00%	3.00
<b>Total VAT incl.</b>			<b>3.00</b>		

Value date:  -  -

Label:

Account:

Amount paid:

Article	Qty	Price	Total price	Settled	Register
<input checked="" type="checkbox"/> Cheddar Crackers Box	3	1.00	3.00	0.00	<input type="text" value="3.00"/>
				0.00	<input type="text" value="3.00"/>

New payment [2010052901C000147](#) was successfully registered.

Figure 5.17: Registering a payment.

### 5.6.3 Registering a shop sale payment

While doing a shop sale (4.6), when articles and client are rightly selected, as shown as an example on Fig.4.19, the payment is ready to be registered.

The registering process, whether the 'Payment method:' is set to 'Cash payment' or 'Cash payment by card', is shown below in both cases ; once registration is achieved, a new order is generated automatically and an invoice corresponding to the shop sale can be printed out.

#### 5.6.3.1 Via cash

Fig.5.18 shows the process of registering payment through such a means.

[Shop Sale Page, after article(s) and client have been chosen] :

The image shows a sequence of three screenshots illustrating the payment registration process. The first screenshot is a 'Register payment' dialog box with a title bar containing a minimize, maximize, and close button. It features a 'Payment method:' dropdown menu set to 'Cash payment'. Below this is a table with the following entries: 'Total purchased articles : 3.00', 'Total amount to be paid : 3.00', 'Paid by client : 5.00', and 'To refund : 2.00'. At the bottom are 'Register' and 'Cancel' buttons, with a red hand cursor pointing to 'Register'. A blue arrow points from this dialog to the second screenshot, which is a summary table with 'Total to be paid : 3.00 USD', 'Paid : 5.00 USD', and 'Refunded : 2.00 USD'. It includes 'Finish order' and 'Cancel payment' buttons, with a hand cursor pointing to 'Finish order'. A second blue arrow points from this summary to the third screenshot, which displays a success message: 'View new order #2011021801078', 'The payment was registered successfully', and 'Click this link to open the printed invoice'.

Figure 5.18: Registering the payment of a shop sale via cash.

### 5.6.3.2 Via credit card

Fig.5.19 shows the process of registering payment through such a means.

It is to note that such a payment is in fact registered as a payment request (5.9.5).

### 5.6.3.3 Balance of a cash register

As illustrated on Fig.5.20, it is possible to check the balance of a cash register on its related page.

### 5.6.3.4 Operations on balance

Through **Operation on balance**, a pop-up and its 'Operation:' menu allow to do the following :

- 'Add to cash flow' a certain amount, as illustrated below ;
- 'Deposit on a bank account' an amount of the money in the cash register ;
- a 'Balance correction'.

[Shop Sale Page, after article(s) and client have been chosen] :

The image shows a sequence of three screenshots from a software application. The first screenshot is a dialog box titled "Register payment". It has a "Payment method:" dropdown menu set to "Cash payment by card". Below this is a table with two rows: "Total purchased articles :" with a value of "22.60" and "Total amount to be paid :" with a value of "22.60". Underneath the table is a section for "Credit card type :" with four radio button options: "American Express", "Bancomat", "MasterCard", and "VISA". The "VISA" option is selected. At the bottom of the dialog are "Register" and "Cancel" buttons. A red hand cursor is pointing at the "Register" button. The second screenshot shows a summary of the payment: "Total to be paid : 22.60 USD" and "Paid by VISA : 22.60 USD". Below this are "Finish order" and "Cancel payment" buttons. A hand cursor is pointing at the "Finish order" button. The third screenshot shows a confirmation message: "View new order #2011022201023", "The payment was registered successfully", and a link "Click this link to open the printed invoice". Blue arrows on the left side of the second and third screenshots indicate the flow from the first screenshot.

Figure 5.19: Registering the payment of a shop sale via a credit card.

#### 5.6.4 Payment numbers

Once registered, a payment is assessed a number, based upon the date it was registered (*not* the date of the actual order/invoice), pasted with a distinctive string. For instance, the payment registered at Fig.5.17 is assessed the identifier [2010052901C000147](#).

#### 5.6.5 Viewing payments

These can be looked for via the [View payments/credit notes](#) ; as shown on Fig.5.22, different search criteria can be inputted :

- the date when the aimed payment was registered ;
- a reference ;
- a name pattern for the client it refers to, also a billing status (5.9.1) ;
- a bank (6.2.1) or cash-box (6.2.3) account.



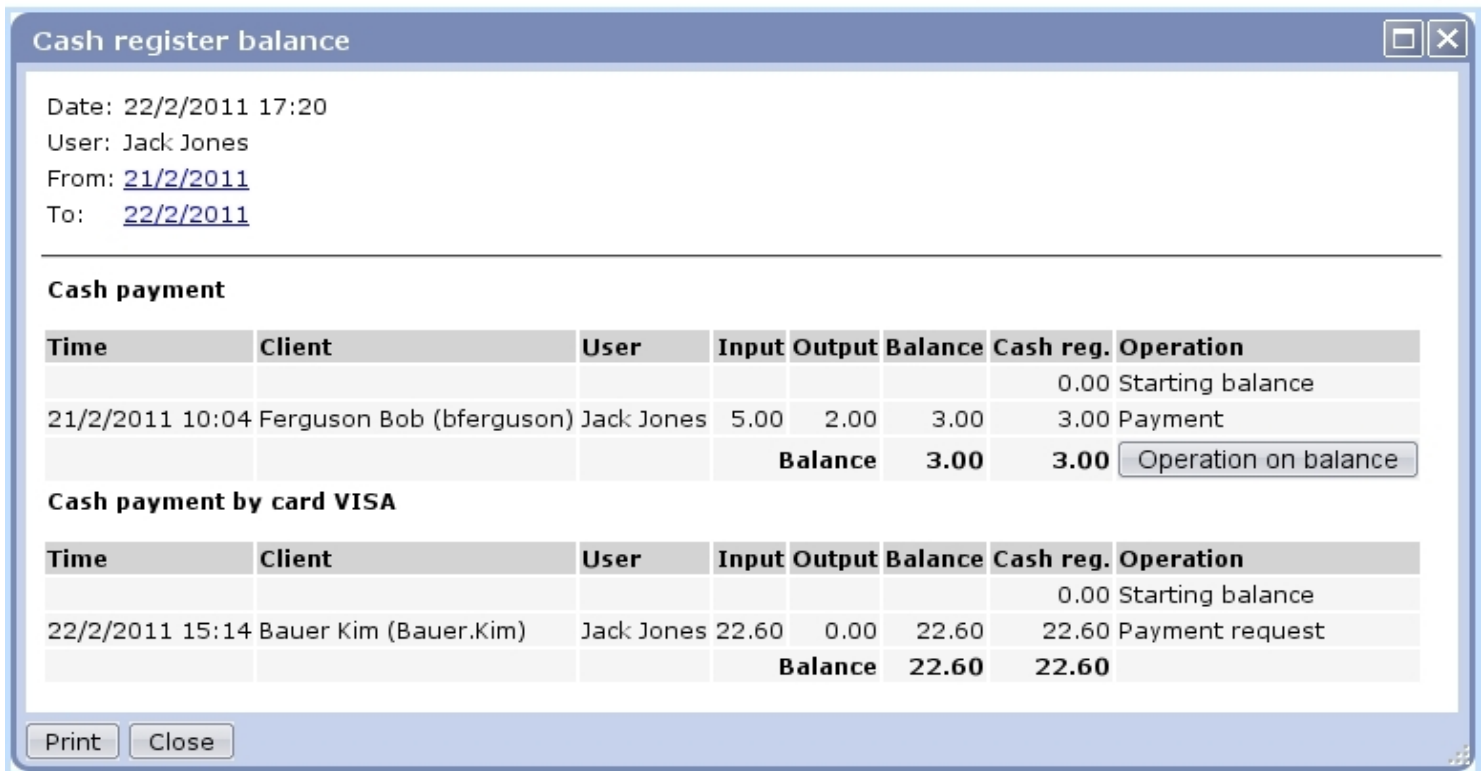



Figure 5.20: Checking the balance of a cash register as it is after the payments registered via cash (5.6.3.1) and via credit card (5.6.3.2).

Payment details can then be displayed by clicking on the [Payment #20...](#) link ; an example is displayed at Fig.5.32 further down.

## 5.6.6 Credit control

This concept has been taken care of in Blue Chameleon, as *classes*.

### 5.6.6.1 Credit control classes



*User rights for generally managing credit control classes can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

**Credit control and SLA management**

If Credit Control is enabled at the *Merchant Configuration Page* (9.1.6), it is then mandatory to have a defined credit control class ; this is done through the same place. Fig.5.23 shows how to define a credit control class.

[Cash Register Balance]

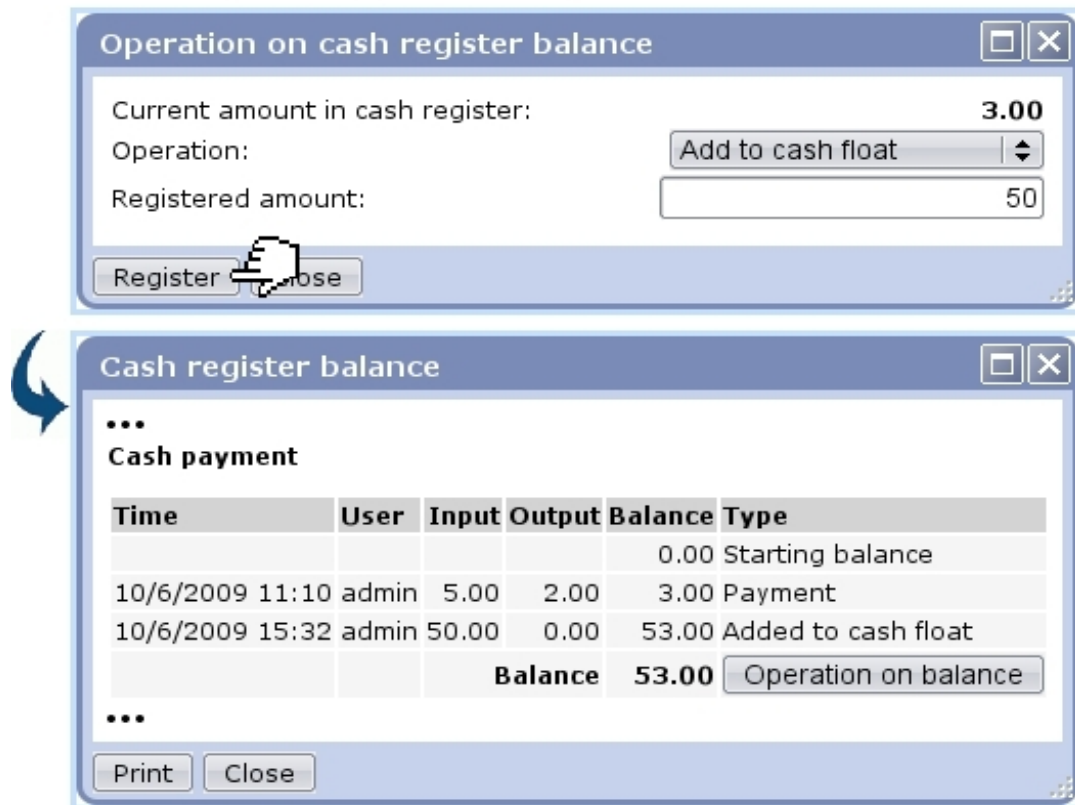


Figure 5.21: Putting change inside a cash register.

/

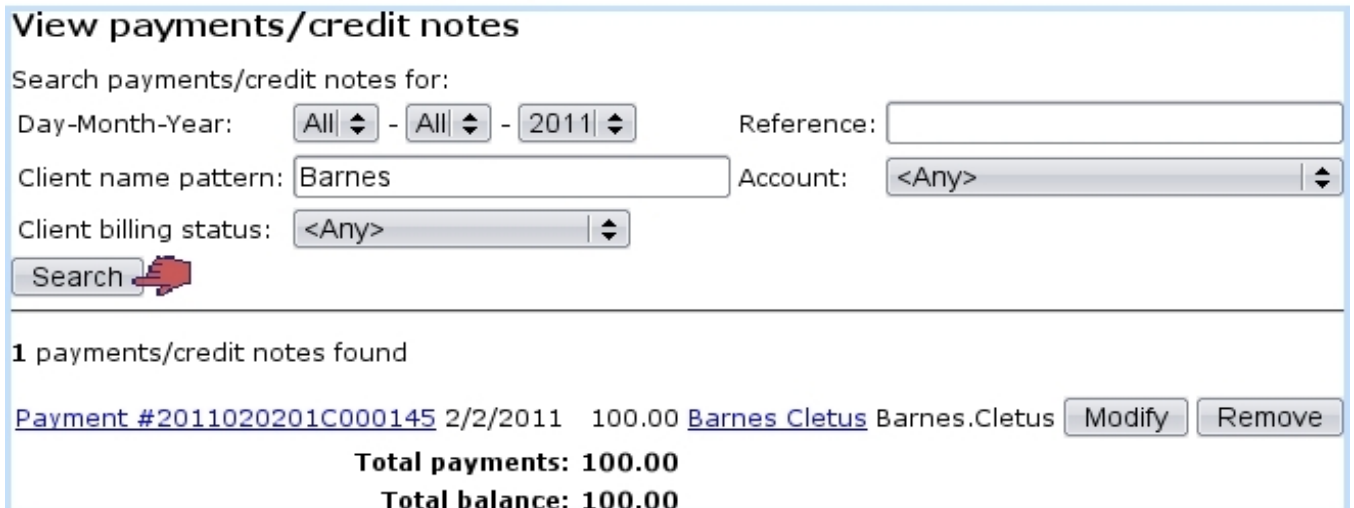


Figure 5.22: An example of payment search.

General / Merchant / Credit control classes / Add new credit control class

### Add credit control class

Class:

Maximum credit:

Deadline:  days  
 from end of month

Min. general user right level:

Min. owner user right level:

**Steps to execute:**

Figure 5.23: Defining a default control class.



*The user rights levels as seen on this page relate to the 'Financial access level:' as set on the Modify User Page (Fig.9.17) : in order to modify this class afterwards, her/his financial access levels will have to be equal or higher than the levels as set while defining the control class. Therefore, the higher the levels are assessed to the credit control class, the more protected it will be.*

Once created, a credit control class is selected from the related menu at the *Merchant Configuration Page* (9.1.6). The credit line is then visible when client balances are checked (5.26).

### 5.6.6.2 Outstanding amounts

It is possible to estimate those from the *Client Payment Management Page* through  / .

On the subsequent page, as featured on Fig.5.24 :

- warning is made if there are invoice addons (5.4.5) that have not been validated yet : a  then redirects to a page (5.4.5.2) where it is possible to view them and validate them ;
- month and year for outstanding amounts to be calculated on are chosen ;
- the calculating task can be started right on the moment or scheduled ; in the later case, a further screen will allow to choose date and time at which this calculation will be launched, as a system task (9.8).

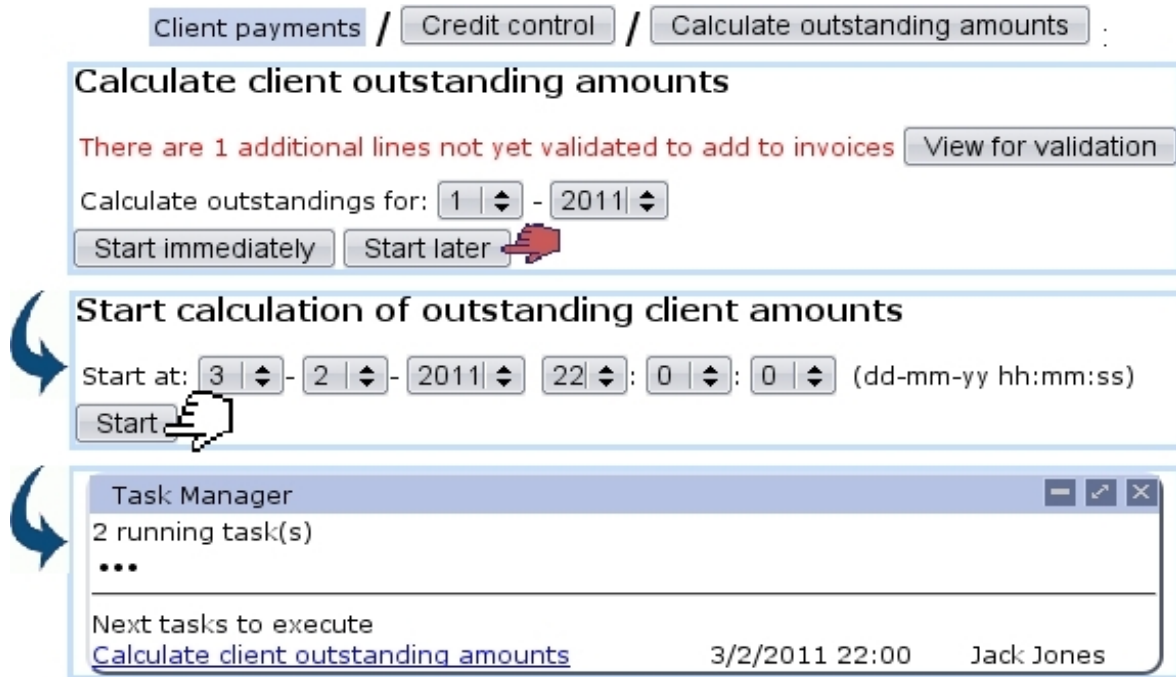


Figure 5.24: Scheduling the calculation of outstanding amounts.

## 5.6.7 Checking client accounts



*User rights for client account management can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Client account management

Clicking on the **View account** button as found on the *Client Payment Management Page* (5.16) leads to a search client page ; to look for a specific client, either click on the corresponding initial letter or enter full name or one part of it, and launch the search by clicking the eponymous button.

You can also run a search or refine it by indicating, via a drop-down menu, the billing status you are looking for (5.9.1) ; for instance, not filling the name field and picking 'First reminder' will display all of your clients whose status is so.

Clients fitting search criteria are then displayed along with :

- their billing status ;
- the date of their last invoice ;
- their total debit and credit, as well as the resulting balance, as a click-link to the *View Client Account Page* as shown in Fig.5.25 ;

- their outstanding debt.

The *View Client Account Page* sums up every invoice, payment and credit note related to that client, each as click-links to see their details. Payments and credit notes can be individually modified or removed thanks to the eponymous buttons, which comes in handy when having to cancel an already-paid invoice (5.8.3).

Client payments / View account :

Search clients whose name start with:  Search

Client billing status: <Any>

[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](#)

**View client account**

Name	Username	Status	Invoice	Debit	Credit	Balance	Outstanding
<a href="#">Mayfield Herbert, Jr</a>	Mayfield.HerbertJr	Ok	10/6/2009	722.51	926.60	204.09	0.00
<b>Total</b>				<b>722.51</b>	<b>926.60</b>	<b>204.09</b>	<b>0.00</b>

**View client account for Mayfield Herbert, Jr**

Date	Reference	Debit	Credit	Balance	
10/6/2009	<a href="#">Invoice #2009061001005</a>	1.17	2.00	0.83	
10/6/2009	<a href="#">Invoice #2009061001003</a>	26.37	22.60	-3.77	
...	...				
23/4/2009	<a href="#">Credit note #2009042301C000111</a>	0.00	150.00	150.00	<span style="border: 1px solid gray; padding: 2px;">Modify</span> <span style="border: 1px solid gray; padding: 2px;">Remove</span>
13/11/2008	<a href="#">Payment #2008111301C000043</a>	0.00	174.00	174.00	<span style="border: 1px solid gray; padding: 2px;">Modify</span> <span style="border: 1px solid gray; padding: 2px;">Remove</span>
<b>Total</b>		<b>722.51</b>	<b>926.60</b>	<b>204.09</b>	

Period shown: all

View details

Hide null balances

Figure 5.25: The *View Client Account Page*.



The *View Client Account Page* is also accessible from the *Client Management Page*'s View account button.

## 5.6.8 Checking client balances

Client payments / **Client balances** :

### Client balances

Invoice reference date: 3 | 1 - 2011

Payment reference date: 3 | 1 - 2011


View: non-null balances

Clients: B - C

Minimum amount: 0 USD

Maximum amount: 0 USD

Accounting exported data only  
 Clients with domiciliation only  
 Clients with exceeding credit only

**View** 

### Client balances on 3/1/2011

Name	Username	Billing	Debit	Credit	Balance	Credit line	Exceeding
<a href="#">Barnes Cletus</a>	Barnes.Cletus	Ok	842.79	655.75	-187.04	250.00	
<a href="#">Bauer Kim</a>	Bauer.Kim	First reminder	803.20	804.60	1.40	250.00	
<b>Total</b>			<b>1645.99</b>	<b>1460.35</b>	<b>-185.64</b>		<b>-314.36</b>

Figure 5.26: Viewing client balances.

Balances are accessed through **Client balances**. There, as displayed at Fig.5.26, display criteria include :

- the dates until which invoices and payments are taken into consideration ;
- a 'View :' mode, selecting balances according to the following choices :
  - non-null balances
  - debit balances
  - credit balances
  - all of them
- an alphabetical range of client names;
- a minimum and a maximum amount given in the selected currency (maximum amount is put to 0 to set no upper limit) ;
- checkboxes :
  - to select only data that has been exported to the External System (6.1.2) ;

- to select only clients having a domiciliation (5.10.1) ;
- to select only clients having exceeding credit.

The result screen then displays :

- clients as click-link to their individual *View Client Account Page* (5.6.7) ;
- their billing status (5.9.1) ;
- their total debit, credit and balance ;
- their credit line, if applicable (corresponding to the chosen 'Credit control class:' on the *Create/Modify Client Page*) ;
- the resulting exceeding amount, if it exists.

### 5.6.9 Checking open invoice balances

Through **Open invoice balances**, as illustrated in Fig.5.27, it is possible to display the balances related to open invoices, classified according to increasing amounts. It is also possible to export those results into a downloadable .csv file.

Client payments / **Open invoice balances** :

**Open invoice balances**

Billing date before: 31 - 1 - 2011


Salesperson: <All>

Minimum balance: 0 USD

Hide null balances

Clients: B - C (not included)

Export into file

**View** 

---

**Open invoice balances on 31/1/2011**

Name	Username	Billing	Credit line	Exceeding Balance	<14	<30	<60	<90	More
<a href="#">Barnes Cletus</a>	Barnes.Cletus	Ok	250.00	-1.17	0.00	0.00	0.00	0.00	-1.17
<a href="#">Bauer Kim</a>	Bauer.Kim	<b>First reminder</b>	250.00	-59.23	0.00	0.00	0.00	0.00	-59.23
				<b>-60.40</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>-60.40</b>

The export file can be downloaded [here](#)

Figure 5.27: Viewing balances related to open invoices and also exporting them.

## 5.6.10 Cost analysis

[In Development]

## 5.6.11 Internal authorization

In your activity, you might have non-tangible articles for which use by the ordering client requires an authorization on your behalf. For those, as payment may sometimes be delayed for whatever reason, you would still want to make the facility available to the client even her/his payment has still not been registered yet.



Figure 5.28: Internally authorizing orders.

To declare it as such in Blue Chameleon, from the *Client Payment Management Page* (5.6), click on **Internal authorization**; on subsequent page as illustrated on Fig.5.28, an order search tool will display the orders for which authorization has been given.

It is to note that internal authorization is a payment request status (5.9.5.1) by which payment request searches can be narrowed (5.9.5.2).

## 5.7 Credit notes

Credit notes are objects that counter a given invoice and can be created either manually or automatically, provided that payment has not been registered yet.

Already-paid invoices can nonetheless be canceled through the client's account (5.8.3).



*Credit note creation requires the existence of at least one credit note account (6.2.2).*



### 5.7.1 Manually registering a credit note

Registering a credit note for an unpaid invoice can be done after an invoice search (5.2) through the **Register credit note**, in a process as shown in Fig.5.29.

[Invoice Search] [#2011020201001](#) (...) **Register credit note** :

**Register credit note**

<b>Reference:</b> 2011020201001	<b>Username :</b> <a href="#">Seranescu.Pompilius</a>
<b>Value date:</b> 2/2/2011	<b>Name :</b> Seranescu Pompilius
<b>Period date:</b> 2/2/2011	<b>Address :</b> 26 Lame Street
<b>Status:</b> open	90210 BH
<b>Order number:</b> <a href="#">2011020201001</a>	USA
<b>Export:</b> not exported	<b>Billing :</b> <b>First reminder</b>
<b>Registered by:</b> Jack Jones	

<input checked="" type="checkbox"/> Article	Quantity	Price	Total price	Settled	Register
<input checked="" type="checkbox"/> Low-Salt Crackers Box	1	2.00	2.00	0.00	2.00
<input checked="" type="checkbox"/> Tomato-Flavored Crackers Box	1	0.80	0.80	0.00	0.80
<input checked="" type="checkbox"/> Cheddar Crackers Box	1	1.00	1.00	0.00	1.00
<input checked="" type="checkbox"/> Standard mail	1	8.00	8.00	0.00	8.00
<b>Total VAT incl. 11.80</b>				<b>0.00</b>	<b>11.80</b>

Value date: 4/2/2011 1 2

**Register**

New credit note [2011020201001/1](#) was successfully registered.

[Invoice Search Page] :

2/2/2011	<a href="#">#2011020201001/1</a> Credit note paid <a href="#">Seranescu Pompilius</a>	... -11.80	<b>Modify</b>
2/2/2011	<a href="#">#2011020201001</a> Invoice paid <a href="#">Seranescu Pompilius</a>	... 11.80	<b>Modify</b>

Figure 5.29: Registering a credit note for a specific invoice.

### 5.7.2 Automatically registering a credit note

This is done when an unpaid invoice is canceled, as displayed on Fig.5.30.

[Invoice Search] [#2011021401001](#) (...)

**Cancel invoice**

<b>Reference:</b>	2011021401001	<b>Username :</b>	<a href="#">Salazar.Ramon</a>
<b>Value date:</b>	14/2/2011	<b>Title :</b>	Mr
<b>Period date:</b>	14/2/2011	<b>Name :</b>	Salazar Ramon
<b>Status:</b>	sent	<b>Address :</b>	4, Taco Street 87100 Albuquerque USA
<b>Order number:</b>	<a href="#">2011021401001</a>	<b>Billing :</b>	<b>Contentious</b>
<b>Export:</b>	not exported		
<b>Registered by:</b>	Jack Jones		

Article	Quantity	Price	Total price
Low-Salt Crackers Box	22	2.00	44.00
Standard mail	1	8.00	8.00
<b>Total VAT incl.</b>			<b>54.94</b>
<b>Total VAT excl.</b>			<b>52.00</b>
<b>Total VAT 6.00%</b>			<b>2.94</b>

 Are you sure you want to cancel this invoice on value date ? 16/2/2011 



Invoice 2011021401001 successfully canceled.

[Invoice Search Page] :

16/2/2011	<a href="#">#2011021401001/1</a>	Credit note canceled	<a href="#">Salazar Ramon</a>	Salazar.Ramon	-54.94	<input type="button" value="Modify"/>
14/2/2011	<a href="#">#2011021401001</a>	Invoice canceled	<a href="#">Salazar Ramon</a>	Salazar.Ramon	54.94	<input type="button" value="Modify"/>

Figure 5.30: Canceling an invoice automatically creates a related credit note.

## 5.8 Reconciling payments

The example of payment registering shown above used the same amount for client payment as the amount of the invoice. But sometimes a client with one or more open invoices may make bulk payments (for instance by check) that are not aimed for one specific invoice.

In the following example, a client has made three orders that have been invoiced, as shown through an open invoice search led through  /  (Fig.5.31).

This client therefore owes 94.00.

Invoicing / Open invoices and credit notes

**Open invoices**

Start date (optional): -- | -- | --

End date: 4 | 2 | 2011

Salesperson: <All>

Minimum amount: 0 USD

Hide null balances

Clients: F | G (not included)

Client billing status: <Any>

Ordered by: Clients

**Open invoices on 4/2/2011**

Name	Username Invoice	Date	Salesperson	Debit	Credit	Balance
<a href="#">Ferguson Bob</a>	bferguson #2011011401001	14/1/2011		68.00	0.00	-68.00
	#2011012001001	20/1/2011		29.00	0.00	-29.00
	#2011012501001	25/1/2011		29.00	0.00	-29.00
	Credit			0.00	32.00	32.00
				<b>126.00</b>	<b>32.00</b>	<b>-94.00</b>
<b>Total</b>				<b>126.00</b>	<b>32.00</b>	<b>-94.00</b>

Figure 5.31: A search on open invoices shows that this client still has to pay for three orders.

### 5.8.1 Registering a bulk payment

He then pays 100 in check ; this payment is registered in the way shown at Fig.5.32 : the *Register Payment Page* is accessed in the standard way described in 5.6.2, that is to say through **Sales** / Client payments / Register payment .

On the list of invoices for client Bob Ferguson, the one with the biggest amount is picked, and on subsequent page, 100 is entered in the 'Amount paid:' field.

Clicking on resulting payment [2011020301C000146](#) (directly after payment registering validation or later through a payment search as explained in 5.6.5) then shows what is featured on Fig.5.33.

#### 5.8.1.1 Registering a payment aimed at no particular invoice

If you wish to not associate right on the moment a payment to a particular invoice, there is a [<None>](#) link on the top list of invoices for which to register payment. As shown in Fig.5.34, this enables you to register a payment to be afterwards used for invoices you will choose.

Client payments / Register payment / [Client Search] Ferguson Bob :

**Register invoice payment**

Choose an invoice or credit note to go on with payment :

Reference	Date	Debit	Credit	Balance
<None>				
<a href="#">2011012501001</a>	25/1/2011	29.00	0.00	-29.00
<a href="#">2011012001001</a>	20/1/2011	29.00	0.00	-29.00
<a href="#">2011011401001</a>	14/1/2011	68.00	0.00	-68.00
<b>Total</b>		<b>126.00</b>	<b>0.00</b>	<b>-126.00</b>

...

Value date: 3 - 2 - 2011

Label:

Account: Cash-box - C#1

Amount paid:

	Article	Qty	Price	Total price	Settled	Register
<input checked="" type="checkbox"/>	Gizmo	1	60.00	60.00	0.00	<input type="text" value="60.00"/>
<input checked="" type="checkbox"/>	Standard mail	1	8.00	8.00	0.00	<input type="text" value="8.00"/>
					0.00	<input type="text" value="68.00"/>

New payment [2011020301C000146](#) was successfully registered.

Figure 5.32: A larger payment for that invoice is registered.

Apart from the value date, label and amount paid, a defined bank (6.2.1) or cash-box (6.2.3) account is assessed to this payment (this 'Account:' menu only appears if several accounts are available ; if there is only one, it is implicitly chosen).

### 5.8.2 Reconciliation process

Reconciliation is the process of using a positive balance to pay for unpaid invoices. Through Blue Chameleon, this is achieved from the *View Account Page for...* (Fig.5.25) by clicking on the invoice to be used ; something which can be attained in two ways :

- either through [Client payments](#) /  / [Client Search] [balance amount](#)
- or through [Client payments](#) /  / [Client Search] [Client Name](#).

[2011020301C000146](#) :

### View payment/credit note

**Reference:** 2011020301C000146      **Username :** [bferguson](#)  
**Payment :** 100.00      **Title :** Mr  
**Posting date:** 3/2/2011      **Name :** Ferguson Bob  
**Value date:** 3/2/2011      **Address :** 23 Namaste Street  
**Account:** C#1      96800 Honolulu  
**Export:** not exported      USA  
**Registered by:** Jack Jones

Description	Reference	Debit	Credit	Balance	
Gizmo	Payment on invoice <a href="#">#2011011401001</a>	0.00	60.00	60.00	<a href="#">Remove reconciliation</a>
Standard mail	Payment on invoice <a href="#">#2011011401001</a>	0.00	8.00	8.00	<a href="#">Remove reconciliation</a>
Payment		0.00	32.00	32.00	

[Print](#)   [Email](#)

Figure 5.33: The details of this payment show well that 68 have gone to pay the invoice and that an extra 32 remains.

[Client payments](#) / [Register payment](#) / [Client Search] [Client Name](#) :

#### Register invoice payment

Choose an invoice or credit note to go on with payment :

Reference	Date	Debit	Credit	Balance
<None>				

#### Register invoice payment

Value date:  -  -

Label:

Account:

Amount paid:

Payment:  (uncheck for repayment)

[Register](#)

Figure 5.34: Registering a payment related to no invoice (yet).

Either way, as the aimed invoice is clicked, as featured on Fig.5.35, a [Reconcile](#) button becomes available.

Next, upon click on [Reconcile](#), a screen with three parts appears (Fig.5.36) :

- a panel (A) where a list of available payments appears ;

Client payments / Reconcile payment/credit note / [Client Search] **Ferguson Bob** :

**Reconcile invoices and payments/credit notes**

Name	Username	Billing	Domiciliation	Debit	Credit	Balance
<b>Ferguson Bob</b>	bferguson	Ok	<a href="#">all orders</a>	58.00	64.00	6.00

**View client account for Ferguson Bob**

Date	Reference	Debit	Credit	Balance		
25/1/2011	<a href="#">Invoice #2011012501001</a>	29.00	0.00	-29.00		
20/1/2011	<a href="#">Invoice #2011012001001</a>	29.00	0.00	-29.00		
14/1/2011	<a href="#">Invoice #2011011401001</a>	68.00	68.00	0.00		
3/2/2011	<a href="#">Payment #2011020301C000146</a>	0.00	32.00	32.00	<input type="button" value="Modify"/> <input type="button" value="Remove"/>	
		...	...			
<b>Total</b>				<b>126.00</b>	<b>100.00</b>	<b>-26.00</b> <input type="button" value="Register online payment"/>

**View client account for Ferguson Bob**

Date	Reference	Debit	Credit	Balance	Export
25/1/2011	<a href="#">Invoice #2011012501001</a>	29.00	0.00	-29.00	not exported ...
		<b>Total</b>	<b>29.00</b>	<b>0.00</b>	<b>-29.00</b>

...

Figure 5.35: Displaying the details on how a payment was used : as overall balance is positive, reconciliation is proposed.

- below, a panel (B) where the clicked invoice details appear ;
- on the right, a panel (C) displaying the details of the payments as clicked in Panel A.

The process shown is as follows : a payment is clicked in panel A, then appears in Panel C ; if it is fine, a checkbox appears in front of the purchased articles (Panel B). It is ticked, and the  button is finally clicked to register the reconciliation.

The successful result of this reconciliation can then be checked on the *View Account Page*, by clicking on the payment : in this example (Fig.5.37), it is well seen that this 100.00 payment has been used to pay for (initially) a 68.00 invoice, then, during this reconciliation, for a 29.00 invoice.

### 5.8.3 Canceling an already-paid invoice

As seen in Fig.5.37, when checking the details of a payment on the *View Account Page*, a  button is available for each attached invoice : clicking on it then allows to remove the payment from the invoice (Fig.5.38) and thus mark it as unpaid, which allows in turn to cancel it.

Invoice #2011012501001 (...) Reconcile

**Reconcile invoice #2011012501001 for Ferguson**

Reference	Type	Date	Balance	
<a href="#">2011020301C000146</a>	Payment	3/2/2011	32.00	<i>Panel A</i>

<b>Reference:</b>	2011012501001	<b>Username :</b>	bferguson	<i>Panel C</i>
<b>Value date:</b>	25/1/2011	<b>Title :</b>	Mr	
<b>Period date:</b>	25/1/2011	<b>Name :</b>	Ferguson Bob	
<b>Status:</b>	open	<b>Address :</b>	23 Namaste Street	
<b>Order number:</b>	<a href="#">2009042201010</a>		96800 Honolulu	
<b>Export:</b>	not exported		USA	
<b>Registered by:</b>	Jack Jones			

Article	Quantity	Price	Total price	Settled	Register
Cracker Box	29	1.00	29.00	0.00	
<b>Total VAT incl.</b>			<b>29.00</b>	<b>0.00</b>	<b>0.00</b>

*Panel A*

<i>Panel B</i>	<b>Reference:</b> 2011020301C000146	<b>Username :</b> bferguson	<i>Panel C</i>
	...	...	

Description	Reference	Debit	Credit	Balance
Gizmo	Payment on invoice# <a href="#">2011011401001</a>	0.00	60.00	60.00
Standard mail	Payment on invoice# <a href="#">2011011401001</a>	0.00	8.00	8.00
Payment		0.00	32.00	32.00

*Panel B*

<input checked="" type="checkbox"/>	Article	Quantity	Price	Total price	Settled	Register
<input checked="" type="checkbox"/>	Cracker Box	29	1.00	29.00	0.00	<input type="text" value="29.00"/>
<b>Total VAT incl.</b>			<b>29.00</b>	<b>0.00</b>		<input type="text" value="29.00"/>

Reconciliation was successfully registered.

Figure 5.36: The 32 as available in the selected payment allows to reconcile the invoice.

[View Client Account Page] [Payment #2011020301C000146](#) :

Date	Reference	Debit	Credit	Balance	Export	
3/2/2011	<a href="#">Payment #2011020301C000146</a>	0.00	100.00	100.00	not exported	<input type="button" value="Modify"/> <input type="button" value="Remove"/> <input type="button" value="Reconcile"/>
14/1/2011	<a href="#">Invoice #2011011401001</a>	68.00	0.00	-68.00	not exported	<input type="button" value="Remove reconciliation"/>
25/1/2011	<a href="#">Invoice #2011012501001</a>	29.00	0.00	-29.00	not exported	<input type="button" value="Remove reconciliation"/>
<b>Total</b>		<b>97.00</b>	<b>100.00</b>	<b>3.00</b>		

Figure 5.37: How this payment was used.



[Invoice Search Page] :

<a href="#">#2011012501001</a>	Invoice	open	<a href="#">Ferguson Bob</a>	bferguson	29.00	<input type="button" value="Modify"/>	<input type="button" value="Cancel invoice"/>	...
--------------------------------	---------	------	------------------------------	-----------	-------	---------------------------------------	---	-----

Figure 5.38: Removing an invoice's payment.

## 5.9 Reminders and payment requests

When invoices go unpaid for too long, reminders can be generated.

### 5.9.1 Billing statuses

Billing statuses (which are different from invoice statuses, 5.1.3) are meant to indicate whenever there is a delay in payment or more serious matters of the legal kind ; the default billing status for a client having a non-negative balance is 'Ok' and is not shown on this client's *Client Management Page*. Every other status appears there with a background color ; available statuses can be used to :

- show the absence of payment ('first reminder', 'second reminder') ;
- the lack of information or the waiting for some ('client without address', 'client without contract', 'order to be prepared', 'address to be verified') ;
- anything pertaining to conflicts and legal action ('court', 'bailiff', 'contentious', 'undesired client').

'First reminder' statuses are triggered automatically whenever a reminding is done.



## 5.9.2 Reminding invoices

Invoices possess a creation date and a period date, starting from which reminders can be produced. Blue Chameleon enables to produce such reminders for all invoices that are past due date, via **Invoicing** / **Remind open invoices**.

At least one 'Reminder'-type work set (5.5.2) has to be defined for reminding operations to work. Fig.5.39 then shows what options can be chosen, amongst other the reminder type (first, second or third), the expiration date, the minimum amount,...

Invoicing / Remind open invoices :

**Remind open invoices**

Reminder type: First reminder

Print set: Reminder for invoices

Clear all reminder sets before generating the new reminders

Expiration date: 8 - 1 - 2011

Minimum amount: 0 USD

Clients: <beginning> - <end>

Hide all null and too small amounts

View

Figure 5.39: Choices by which to display open invoices.

Upon validation by **View**, next screen displays, as shown in Fig.5.40, a list of clients with open invoices, and for each of them, their list of invoices. Thanks to tick boxes, it is possible to select or de-select particular clients and/or invoices.

Also, the corresponding debit/credit/balance are conveniently displayed. Next, reminder options are chosen : whether to send reminder by mail and send bill by mail, also, if applicable adding an invoice with the corresponding reminder charge (5.4.4).

Finally, confirmation screen shows how many invoices have been reminded, and for which amount.

As a result of this reminding, on the *Client Management Page* of the involved clients, 'Billing :' is now set automatically to 'First reminder' (Fig.5.41).

## 5.9.3 Looking for and displaying reminded invoices

A reminded invoice search tool as featured in Fig.5.42 is available via **Invoicing** / **Reminders**. It is pretty similar to the invoice search tool as presented in 5.2.


View :

**Remind open invoices**

Name	Invoice	Date	Debit	Credit	Balance
<input checked="" type="checkbox"/> <a href="#">Bauer Kim</a>	<input checked="" type="checkbox"/> #2010120401002	04/12/2010	58.00	40.00	-18.00
			<b>58.00</b>	<b>40.00</b>	<b>-18.00</b>
<input checked="" type="checkbox"/> <a href="#">Scofield Michael</a>	<input checked="" type="checkbox"/> #2010112901004	29/11/2010	100.00	0.00	-100.00
	<input checked="" type="checkbox"/> #2010122201009	22/12/2010	80.00	0.00	-80.00
			<b>180.00</b>	<b>0.00</b>	<b>-180.00</b>
<input checked="" type="checkbox"/> <a href="#">Seranescu Pompilius</a>	<input checked="" type="checkbox"/> #2010120701001	07/12/2010	1.00	0.00	-1.00
			<b>-1.00</b>	<b>0.00</b>	<b>-1.00</b>

...

Toggle client selection

Remind selected invoices 

**Remind open invoices**

**Choose reminder charge:**


Send reminder by mail  
The reminder will be sent to you by mail.

**Choose reminder delivery:**

Send bill by mail  
The bill will be sent to you by mail.

Add invoice with reminder charge

Send this reminder to client

Remind 

**9 open invoices for a total amount of 293.29 USD successfully added to set Reminder for invoices.**

Figure 5.40: Making choices on clients to whom to send reminders, and for which invoices ; and setting contact options.

As shown on Fig.5.43, clicking on the date of an individual reminder allows to show its history and the invoices it reminds.

### 5.9.4 Configuring reminders

[In Development]

[Client Management Page for Michael Scofield] :

Client management	
<b>Username:</b>	Scofield.Michael
<b>Name:</b>	Scofield
<b>First name:</b>	Michael
...	
<b>Billing:</b>	First reminder

Figure 5.41: Billing status is updated automatically for reminded clients.

Invoicing / Reminders :

### View reminders

Date:  -  -       Status:

Name pattern:       Registered by:

---

10 reminder(s) found

<a href="#">4/5/2009</a>	Reminder for invoices <a href="#">Sheldon Helen</a>	Sheldon.Helen	2.46 sent
<a href="#">4/5/2009</a>	Reminder for invoices <a href="#">Seranescu Pompilius</a>	Seranescu.Pompilius	71.46 sent
...			

Figure 5.42: Displaying the reminders issued on May, 2009.

[4/5/2009](#) Reminder for invoices [Sheldon Helen](#)

<b>Posting date :</b>	4/5/2009
<b>Value date :</b>	4/5/2009
<b>Client :</b>	<a href="#">Sheldon Helen</a> ( Sheldon.Helen )
<b>Reminder :</b>	Reminder for invoices
<b>Status :</b>	sent
<b>Registered by :</b>	admin
<a href="#">#2009050401000148</a>	reminded 1.23
<a href="#">#2009031901000103</a>	reminded 1.23
<b>Total: 2.46</b>	

Figure 5.43: The history and contents of a particular reminder.

## 5.9.5 Managing payment requests

Payment requests can be displayed easily by clicking the  button, still in the *Client Payment Management Page*. There, search criteria can be picked to render searches more accurate : a defined payment method (6.4.1) or bank account (6.2.1) can be picked, as well as a payment request status.

**View payment requests**

Payment method:

Account:

Status:

---

Payment method **Transfer to our Bahamas account**

Status **internal authorization**

Date	Reference	Client	Identification	Amount	Comment	Validate	Remove	Domiciliation
09/02/2011	<a href="#">2011020901002</a>	Scotfield Michael	DCKDCMGKDMIFKECJEHDH	400.00				

Figure 5.44: A payment request search done on internally authorized orders.

### 5.9.5.1 Payment request statuses

They are five :

- started payment request ;
- checked payment request ;
- failed payment request ;
- successful payment request : request has finally led to payment ;
- internal authorization (5.6.11).

### 5.9.5.2 Payment request search results

They feature a sorted-by-date list of order numbers (each clickable, leading to the *View Order Details Page* (4.3) and for each the client name, the payment request identification, the amount claimed, the payment method, the payment request status and, if applicable, three checkboxes ('Comment'/'Validate'/'Remove'). Fig.5.44 features for instance a search for particular payment requests.

## 5.10 Domiciliation management



User rights for domiciliations (creating, batches,...) can be set up either at the *Modify User Page* (Fig.9.17) or the *User Right Page* (11.2) under the element

**Domiciliation management**

Domiciliation matters are mostly taken care of from **Sales** / **Domiciliations**. In order to achieve anything related to them, it is necessary to have created at least one payment method of the domiciliation type (6.4.1).

### 5.10.1 Creating default Client domiciliation order

The first step is creating a default, 'all-orders' domiciliation order for a client. This is achieved via her/his *Client Management Page*, accessed as described in 2.3. There, **Domiciliation orders** leads to this client's *Domiciliation Order Management Page*, which allows to create domiciliation orders as well as display her/his bank accounts and executed domiciliation payments.

Creating a domiciliation order is then done via the eponymous button ; on subsequent page as displayed at Fig.5.45, amongst other things a client bank account is first defined through **Add new account**, a client number is given. Below, orders this client did can be picked individually for them to be assessed a new domiciliation payment method.

Finally, a confirmation screen shows the success of the domiciliation order creation.

### 5.10.2 Viewing default Client domiciliation order

Upon successful creation of default domiciliation order as described above, the previous **Create domiciliation order** is now **Existing domiciliation orders**, which leads to the *View Client Domiciliation Orders Page* as featured in Fig.5.46.

From there, for a particular domiciliation order, it is possible to :

- **Replace** the current account by another ;
- **Modify** the client number and maximum amount per line ;
- **Finish** it ; a new payment method needs then to be chosen ;
- **Show executed orders**, i.e. all the domiciliation-pertaining details such as related batch (5.10.6), date, bank account...

It is also possible to **Add an additional domiciliation order** in a similar way as described above : this will be done now for 'real' orders .

Finally, clicking on the [all orders](#) link (also now featured on the *Client Management Page*) displays the domiciliation order's details.

Once a client domiciliation order has been created, adding a new one as well as displaying the *View Client Domiciliation Orders Page* can now be achieved via **Sales**

**Add domiciliation order for client Marshall Justin**

Order: [all orders \(Bank domiciliation\)](#)

Account: [--- Please create an account ---](#) [Add new account](#)

**Add client bank account**

Account:  [Add](#)

**Add domiciliation order for client Marshall Justin**

Order: [all orders \(Bank domiciliation\)](#)

Account: [XXXX...](#) [Add new account](#)

Client number:

Max. amount per line:

Status: [registered](#)

Choose a new domiciliation payment method for the following orders:

[2011020701001](#) Gizmo 1 60.00 (VAT incl.) [Add](#)

Client domiciliation order was successfully added.

Figure 5.45: Creating a 'all-orders' domiciliation order for client Cletus Barnes, on his defined account.

/ [Domiciliations](#) / [Add client domiciliation](#) and [Existing client domiciliations](#) (both lead to a client search, as this accessing is not done following a particular client anymore).

### 5.10.3 Creating Client domiciliation orders

Now, once a client with domiciliation has done an order (registered of course with the 'Bank domiciliation' payment method), the domiciliation order for that order can be created through [Domiciliations](#) / [Add client domiciliation](#), as shown on Fig.5.47. The 'Order:' drop-down menu now contains the order number (4.1.6) for which to create the domiciliation order.

### 5.10.4 Payment orders

Payment orders (that is to say, for clients with domiciliations) can be displayed through [Domiciliations](#) / [View order domiciliation orders](#), as shown on Fig.5.48.

**View client domiciliation orders for Marshall Justin**

Order	Status	Registered	Send	
<a href="#">all orders</a>	registered	7/2/2011		<input type="button" value="Replace"/> <input type="button" value="Modify"/> <input type="button" value="Finish"/> <input type="button" value="Show executed orders"/>

---

Order: **all orders**

Account:

---

Order: **all orders**

Client number:

Status:

Max. amount per line:

---

Choose a new payment method for the following orders:

[2011020701001](#) At-Home Help, basic 1 100.00 (+ 15.00% VAT)

Are you sure you want to remove the client domiciliation order **all orders** ?

---

**View executed client domiciliation orders**

Batch Date	Domiciliation Invoice	Amount	Bank account	Status	Message
...	...	...	...	...	...

Figure 5.46: This page lists all domiciliation orders for a particular client, so far only 'all orders'.

### 5.10.5 Viewing domiciliations

As featured on Fig.5.49, on the *View Client Domiciliation Orders*, it is possible to search for clients, domiciliation-wise, by :

- name ;
- bank account ;
- domiciliation order status (registered, sent, suspended, activated, finished - or any of those) ;
- client number.

On this page's search results :

Sales / Domiciliations / Add client domiciliation / [Client Search] [Marshall Justin](#) :

### Add domiciliation order for client Marshall Justin

Order:

Account:

Client number:

Max. amount per line:

Status:

Choose a new domiciliation payment method for the following orders:

[2011021001001](#) Gizmo 1 60.00 (VAT incl.)

 Client domiciliation order was successfully added.

Figure 5.47: Creating a domiciliation order, from the 'Sales' environment.

Sales / Domiciliations / View order domiciliation orders :

### View payment orders

Search mode:

Order numbers:

Search confirmed orders only

---

**1 orders found**

Date	Order	Client	Username	Status	Payment order
7/2/2011	<a href="#">2011020701001</a>	<a href="#">Marshall Justin</a>	jstn.mrsh73	Invoiced	<a href="#">2011020701001</a> (Pay by transfer)

Figure 5.48: The example order above is dutifully displayed.

- the client's name is featured as a click-link leading a page where her/his domiciliation orders are shown in detail (c.f. Fig.H2MM *This page lists all domiciliation orders for a particular client*) ;
- a  buttons allows to send domiciliation.

#### 5.10.5.1 The 'Billboard' event control

In order to remind how many domiciliation orders are in wait of activation, a 'Billboard' event control can be activated :



**View client domiciliation orders**

Search clients whose name start with:  Domiciliation order status:

Client bank account:  Client number:

[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](#)

<input type="checkbox"/>	Name	Username	Client number	Registered	Send
<input type="checkbox"/>	<a href="#">Marshall Justin</a>	jstn.mrsh73	124	7/2/2011	

Figure 5.49: The *View Client Domiciliation Orders* : viewing clients for which domiciliation is 'registered'.



The click-link as seen there leads to the *View Client Domiciliation Orders*, with 'Domiciliation order status' menu set directly to 'registered'.

## 5.10.6 Domiciliation batches handling

[In Development]

### 5.10.6.1 Filling a domiciliation batch

[In Development]

## 5.10.7 Domiciliation returns

[In Development]



# Chapter 6

## General Accounting

This Chapter's aim is to unravel how General Accounting is taken care of inside Blue Chameleon.

Most commands explained in this section are accessible from the **Sales** command group.

### 6.1 Working with external accounting system

External system matters are taken care of from the *External System Management Page*, as accessed via **Sales** / **External system** and featured at Fig.6.1. All actions described in this section are done using this page's buttons.



Figure 6.1: The *External System Management Page*, with buttons designed to accomplish external accounting-related actions.



*For this page to be accessible, the 'External Account Management:' at the Merchant Configuration Page (9.1.6) must be set to either 'manual export' or 'automatic export if possible'.*

The aim of defining accounts and indicating them while on various pages (such as, for instance, article pages (3.2.1.1)) is to make any invoice, payment,... easily exportable

(6.1.2) through the means of a file or, if applicable, to the Online General Accounting tool (6.5).

### 6.1.1 External accounts management



*User rights for handling external accounts can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

#### **External account and export management**

In various pages of Blue Chameleon, an external account has to be given, through which to link an object (article, delivery method, tax,... ) to the External Account System. External accounts are defined through **External accounts** / **Add new external account**, as shows Fig.6.2.

On the subsequent *Add External Account Page*, you will have to pick this new external account's type from a drop-down menu ; several are available :

- 'article' and 'article expenses' : to be associated with an article while at its *Add/Modify Article Page* (3.1.1/3.2.1.1) ;
- 'client' : to be associated with a client while at her/his *Add/Modify Client Page* (2.1/2.2.3) ;
- 'VAT' : to be associated with a tax code (6.3.2) ;
- 'stock article' and 'pending stock article' : to be associated with a stock category or stock article (3.6.1.3, 3.6.1.4) ;
- 'bank account' : to be associated with a bank account (6.2.1) ;
- 'credit note account' : to be associated with a credit note account (6.2.2) ;
- 'cash register account' : to be associated with a cash register account (6.2.3) ;
- 'delivery' : to be associated with a delivery method (4.5.1) ;
- 'payment' : to be associated with a payment method (6.4.1) ;
- 'salesperson' and 'counterpart' : to be associated with a salesperson (9.6.1) ;
- 'cash register transition' : to be associated with a user (9.4.2);
- 'pending depreciation' and 'pending expenses' : to be associated with stock article statuses (3.6.5.1.1).

For all of these, an account can be defined as default (only defined once, appearing as <Default> in the related page's 'External account:' menu) or specific (several for each type can be defined, appearing as the given account number in the related page's 'External account:' menu).

External accounts / Add new external account :

**Add external account**

Type:  ▾

Account:

Label:

Figure 6.2: Adding a new external account 40001, which will be used as the specific external account for clients.

Current external accounts are then handily accessed via **External accounts**. They are there displayed as a list with for each account its label, the type attached to it, and the possibility to edit or delete it with the help of **Modify** and **Remove** buttons (Fig.6.3).

External accounts :

**External accounts**

Account:  Account type:  ▾

<a href="#">1012</a>	Default Article Account	Default article	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
<a href="#">30001</a>	Food articles	Specific article	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
<a href="#">40001</a>	Client account	Specific client	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
<a href="#">44000</a>	Default VAT Account	Default VAT	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
<a href="#">44572</a>	Am-VAT 5%	Specific VAT	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
<a href="#">44573</a>	Euro-VAT 15%	Specific VAT	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>

...

Figure 6.3: Viewing current external accounts, with a search tool by type.

In order to accomplish all operations related to external accounting (such as exporting), it is necessary that at least default accounts for clients, articles, payment and delivery methods are defined.

## 6.1.2 Manually exporting data : through a file and/or the External System

This task is done when, at the *Merchant Configuration Page* (9.1.6), choice for 'External account management:' has been given to **manual export** (but can also be achieved even if 'automatic export if possible' was chosen). Manual exporting is achieved through **Export to external system**, as pictured in Fig.6.4.

External system / **Export to external system** :

### Export to accounting system

The following data are ready for export: **Recalculate**

Accounts:	5
Invoices:	11
Payments:	3
Stock movements:	1

---

Date of last posting to export: 11 - 2 - 2011

Export postings in years: 2011 to 2011 by value date

Export canceled orders:

Export stock movements:

Export stock movements only:

Export accounts only:

Export problem report only:

Export into local accounting system:

Export filename: Expt.xml

**Export**

### Export to accounting system

---

The following data have been exported to [Expt.xml](#):

Accounts:	5
Invoices:	11
Payments:	3
Stock movements:	1

**Back to menu** **Close**

Task successfully closed

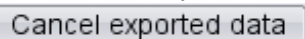
Figure 6.4: Exporting to the External System.

Apart from the menus enabling the timely selection of data to export, several checkboxes allow to :

- export canceled orders (4.4.2) ;
- export stock movements (3.6.5.7), *or* only stock movements ;
- export only the accounts ;
- produce only the export problem report : see 6.1.2.1 ; this checkbox must be **unticked** in order to really process the export ;
- export into local accounting system, i.e. OGA (6.5).

For the latter, if the Online General Accounting tool (6.5) is installed on your Blue Chameleon account, enabling this box will export the various invoices, payment,... to OGA on the 'Shop to Accounting' Journal (6.5.4.2).

If necessary, it is also possible from the *External System Management Page* to



### 6.1.2.1 Export problem report

If the 'Export problem report only:' checkbox is ticked before manually exporting data (see above), an export simulation will be done : at the end, a list of problems related to why some invoices, stock article movements, payments... (if any) would not be exported is displayed. An example is featured on Fig.6.5.

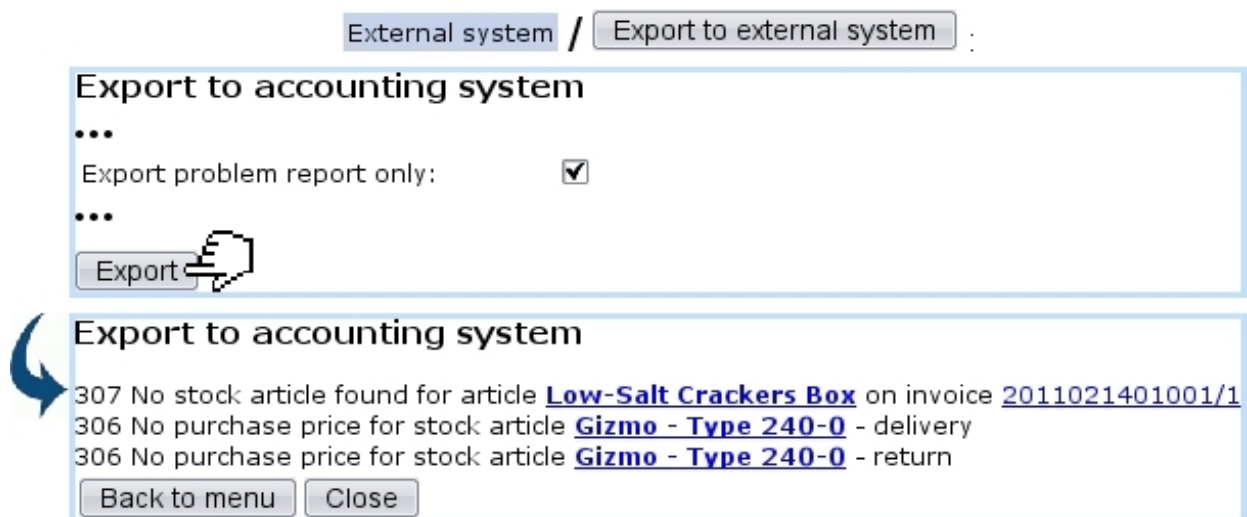
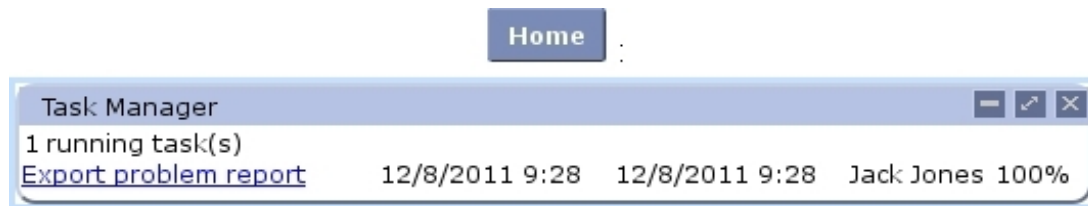


Figure 6.5: This report shows what would not be successfully exported and why.

This report, clearly showing the causes, allows to fix them, so that a real export (made with 'Export problem report only:' unticked) can be done without any flaw.

The generating of such a report also counts as a system task (9.8) ; as long as this task is not closed, it is possible to view the problem report anytime with the click-link as available on [Home](#) :



### 6.1.2.2 Manually exporting missing commissions

Missing commissions (9.6.2) have a dedicated page for manual exporting, as featured in Fig.6.6. This page is roughly similar to the one described above, with two new menus :

- an 'Article:' menu, for restricting export to commissions related to one particular article (by default, <All>) ;
- a period menu, with month and year.



Figure 6.6: Exporting to the External System the missing commissions.

### 6.1.3 Automatically exporting data

If, at the *Merchant Configuration Page* (9.1.6), [automatic export if possible](#) has been chosen for 'External account management:', invoices and payments are directly exported to the External System (i.e. if applicable the Online General Accounting tool, 6.5) as soon as they are created.



## 6.1.4 Stock export

As seen in Fig.6.4, the *Export to External System Page* provides a checkbox to export stock movements. Those can be of the following :

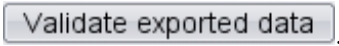
- stock entries (3.6.3) ;
- stock deliveries (3.6.4) ;
- stock exits (3.6.5.8) ;
- stock returns (3.6.5.9).

Amounts are written on credit and debit accounts that differ according to stock movement's nature and whether related stock article has depreciation. The following table sums up which accounts will be written on during the export process :

Stock movement	Credit account	Debit account
Stock entries	Pending Stock Article	Stock Article
Stock deliveries and exits	Stock Article	<i>If stock article has depreciation :</i> Pending Depreciation <i>If stock article has no depreciation :</i> Pending Expenses
Stock deliveries and exits	<i>If stock article has depreciation :</i> Pending Depreciation <i>If stock article has no depreciation :</i> Pending Expenses	Stock Article

All of these accounts need to be defined (6.1.1) for stock movement exports to be properly processed.

## 6.1.5 Validating data

Once data has been exported, it may be necessary to validate it via . As shown on Fig.6.7, system shows how many invoices, payments,... have been exported and are now to be validated.

## 6.1.6 Exporting to flat file

The last possibility on the *External System Management Page* is to export the data on a flat file. Now, it is possible to define an interval date inbetween which to take data, and also to pick a specific external account ; finally, choice can be made to export only data that has been previously exported.

Fig.6.8 shows for instance the flat file creation related to already-exported data on all external accounts.

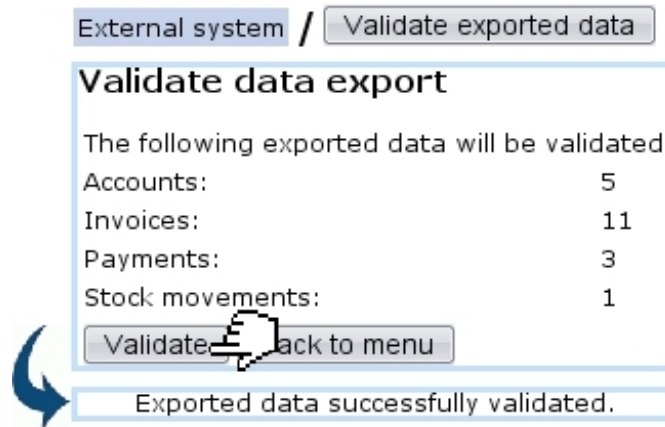


Figure 6.7: Validating previously exported data.

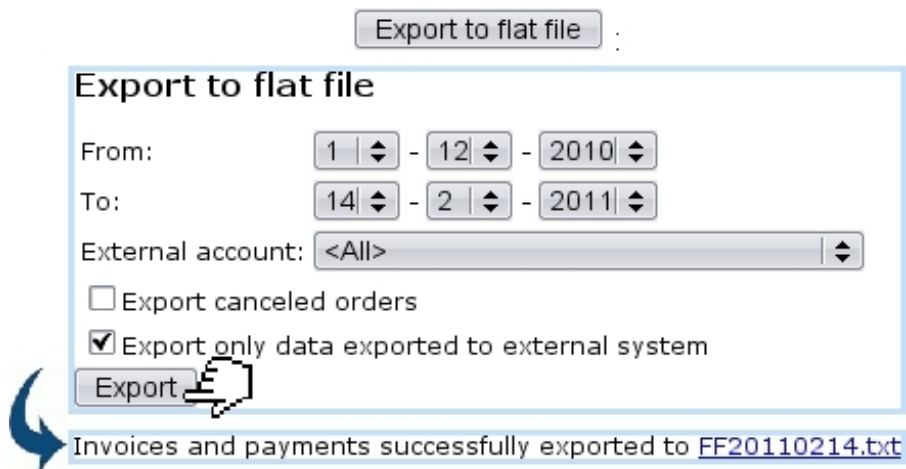


Figure 6.8: Exporting accounting data to a flat file.

On confirmation screen, clicking on the link shows the flat file's contents ; to save the flat file, do a right-click save the target.

Fig.6.9 finally shows an excerpt of this example flat file.

## FF20110214.txt :

```
"Reference";"Valuedate";"Account";"Credit";"Debit";"Label"
"FB173";"2011-02-02";"410100";"0.00";"11.80";"Invoice #2011020201001 - Seranescu Pompilius"
"";"2011-02-02";"1012";"0.00";"90.00";"Chunky Choc Bar"
"";"2011-02-02";"30000";"0.00";"8.00";"Receive order by mail"
"FB75";"2011-01-14";"410100";"0.00";"68.00";"Invoice #2011011401001 - Ferguson Bob"
"";"2011-01-14";"1012";"29.00";"0.00";"Cracker Box"
"FB179";"2010-12-11";"410100";"98.00";"0.00";"Invoice #2010121101002 - Smith John"
"";"2011-12-11";"1012";"0.00";"24.00";"Chunky Choc Bar"
"FB180";"2010-12-08";"410100";"24.00";"0.00";"Invoice #2010120801001 - Barnes Cletus"
"";"2010-12-08";"1012";"0.00";"2.00";"Low-Salt Crackers Box"
"";"2010-12-08";"1012";"0.00";"0.80";"Tomato-Flavored Crackers Box"
"";"2010-12-08";"1012";"0.00";"1.00";"Cheddar Crackers Box"
"";"2010-12-08";"30000";"0.00";"8.00";"Receive order by mail"
...

```

Figure 6.9: An excerpt of a flat file.

## 6.2 Merchant bank accounts

Accessed via **Sales** / **Merchant bank accounts**, they gather several types of accounts that appear in various contexts :

- bank accounts, to be associated with payment methods (6.4.1) ;
- credit note accounts, necessary to register credit notes (5.7) ;
- cash-box accounts, necessary to create cash registers (9.2.1).

They are directly displayed as a click-list when accessing either **Bank accounts**, **Credit note accounts** or **Cash-box accounts** from the aforementioned path, each item in the account leading to the description of the clicked account, while **Modify** and **Remove** buttons allow respectively to edit information on account or delete it completely.

### 6.2.1 Bank accounts

The management of your bank accounts is accessed via **Sales** / **Merchant bank accounts** / **Bank accounts**. There, as pictured in Fig.6.10, **Add new bank account** leads to a page where you pick up the bank this new account is homed at, thanks to a drop-down menu ; then, fill in the account itself in IBAN form. Validation is finally done by clicking on **Add** at the bottom of the page.

[In Development : internationalizing bank account adding]

A bank account is attached to a default or specific 'bank account' external account (6.1.1).



Figure 6.10: Adding a new bank account.

## 6.2.2 Credit note accounts

These are set in the way shown at Fig.6.11.

Credit note accounts / Add new credit note account

**Add merchant credit note account**

Account:

External account:

Add

Figure 6.11: Adding a new credit note account.

A credit note account is attached to a default or specific 'credit note' external account (6.1.1).

## 6.2.3 Cash-box accounts

These are set in the way shown at Fig.6.12.

Cash-box accounts / Add new cash-box account

**Add merchant cash register account**

Account:

External account:

Add

Figure 6.12: Adding a new cash-box account.

A cash-box account is attached to default or specific 'cash register' external account (6.1.1).

## 6.3 Tax settings



User rights for managing taxes (creating, modifying, deleting) can be set up either at the *Modify User Page* (Fig.9.17) or the *User Right Page* (11.2) under the element

### Tax management

Tax is an important component that is featured whenever an order or invoice are dealt with ; Blue Chameleon handles taxes in a geographical way, that is to say, whether an order is made in your country or from another place in the world.

Fig.6.13 shows the *Tax Code Page* as accessed via **General** / **Miscellaneous** / **Taxes**. It features two buttons, one to manage tax categories and another to add tax codes.

**General** / **Misc** / **Taxes** :

#### Tax codes

Category	Tax	Short	External account		
USA	VAT 6% (6.00 %)	UV6	44572 - Am-VAT 5%	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
EU	VAT 15% (15.00 %)	EU15	44573 - Euro-VAT 15%	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
Rest of the world	Rest of the world (0.00 %)	RotW	<Default>	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>

Figure 6.13: *Tax Code Page*, featuring all defined tax codes.

The functions of these are explained below.

### 6.3.1 Tax categories

The *Tax Category Page* as accessed via the eponymous button (as found on the *Tax Code Page*, see above), allows you to define geographical zones and for each, the way taxes apply (without, optionally, or mandatorily).

This page is featured on Fig.6.14, which also shows an example of tax category creation.

These defined time zones will be then featured on the 'Countries where orders are accepted from' menus of the *Modify Merchant Page* (9.1.9) for Country and Languages.

General / Misc / Taxes / Tax categories :

**Tax code categories**

Add new category

Category	Tax	
USA	with taxes	Modify
EU	optional taxes	Modify

Add new category :

**Add tax category**

Category: Rest of the world

Tax: without taxes

Add

Figure 6.14: (Top :) The Tax Category Page ; (bottom :) adding 'Rest of the World' as a zone for which no tax apply.

### 6.3.2 Tax codes

As illustrated on Fig.6.15, various tax codes with different amounts and applying to the zones as previously defined are then created through the **Add new tax** as found on the *Tax Code Page*. Each tax code must have a default or specific 'VAT' external account (6.1.1) attached to it. Also, a shorter label can also be defined.

General / Misc / Taxes / Add new tax :

**Add tax code**

Category: EU

Tax rate: 15 %

Label: Euro-VAT 15%

Short label: EU15

External account: 44573 - Euro-VAT 15%

Add

Figure 6.15: Adding a new tax code.

Already-defined tax codes can be viewed, modified or deleted anytime.

## 6.4 Payment methods



*User rights for payment methods management (creating, modifying, sets,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Payment management

It clearly stands as determinative that you have handy and numerous payment methods for receiving clients' payments. The payment method managing is accessed via

**General** / **Miscellaneous** / **Payment methods**.

### 6.4.1 Defining and managing payment methods

Payment methods are defined in an exact way as article delivery methods, fully described in 4.5.1. Fig.6.16 shows for instance the creation of a by-transfer payment method.

**General** / **Misc** / **Payment methods** / **Add new payment method** :

#### Add payment method

Leave out a text field to choose the default label.

Payment type:

Payment costs:

Language **English**:

Payment method label:

Description:

Confirmation:

...

Related account:

External account:

Credit note account:

Figure 6.16: Adding a payment method where client payments will be transferred on the specified account.

A payment method requires to be assigned three accounts :

- a related bank or cash-box account (6.2.1, 6.2.3) ;

- a default or specific 'payment' external account (6.1.1) ;
- a credit note account (6.2.2).

Also, payment costs, if any, are set in a similar way as for delivery costs (4.5.1.1).

#### 6.4.1.1 Payment methods and supported article delivery methods

For each payment method, as listed from [Payment methods](#), it is necessary to define the article delivery methods that are supported by this payment method. Fig.6.17 shows for example the setting of supported delivery methods for the 'credit card' payment.

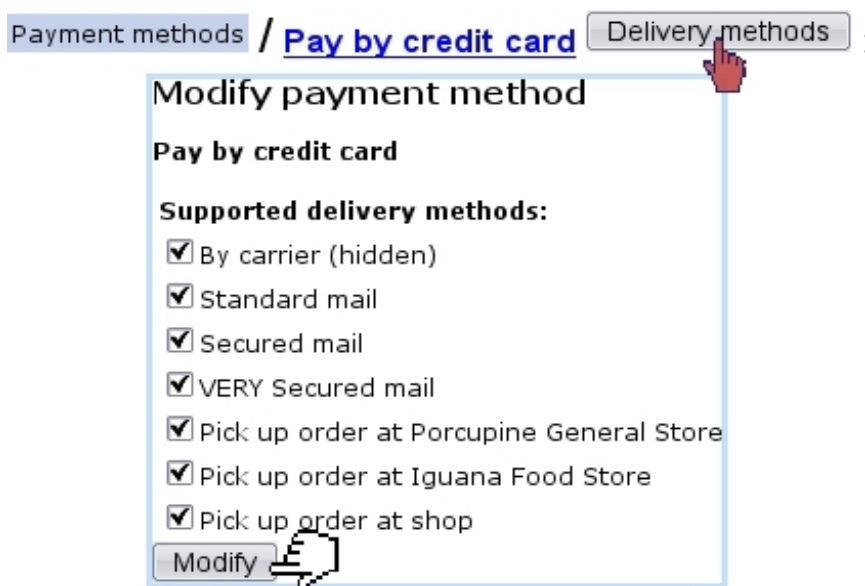


Figure 6.17: This payment method will support all pick-up-order delivery methods.

#### 6.4.2 Payment method sets

Payment method sets are used to gather payment methods and are accessed via [Miscellaneous / Payment sets](#); in order to access this, 'Payment set management' must be enabled at the *Merchant Configuration Page* (9.1.6). Fig.6.18 then shows for instance the creation of such a payment set.



Misc / Payment sets / Add new payment set :

### Add payment method set

Label:

Payment methods:

- Pay by credit card
- Bank domiciliation
- Pay by check
- Transfer to our Bahamas account
- Transfer to our Caiman Islands account
- Via Paypal

Figure 6.18: Creating a payment method set gathering certain payment methods with common features.

## 6.5 The Online General Accounting tool (OGA)

In order to take care of your company's general accounting, Blue Chameleon provides a complete, dedicated and secure tool that will enable you to :

- manage accounts ;
- register VAT-enabled, general postings on your own defined journals ;
- generate printable PDF files of
  - balances and postings, searchable through diverse criteria ;
  - the Balance Sheet and Income Statement ;
  - the General Ledger.


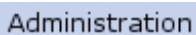
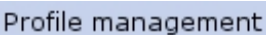
OGA's "online" character will make you avoid the hidden costs associated with traditional accounting software such as installation, upgrades, exchanging data files and backup.


All commands as used below are accessed via the  command group.




### 6.5.1 Rights related to OGA

Rights for OGA are related to users for their general access to it and for their access to specific accounts.

#### 6.5.1.1 Setting OGA access to users

OGA's access and features can be set for different users, each of them being assessed a 'Profile' amongst 16 available. First, as shown on Fig.6.19, through  /  / , the list of all profiles is displayed.

A  button right to 'Profile 1' is clicked and it is possible to change 'Profile 1' to user's name ; render this profile active.

Then, as featured on Fig.6.20 the user's rights for OGA are set on her/his *Modify User Page*, via  /  / . A profile is selected, here 'Mary'.

For this user, the various rights rule access and creation/modifying rights pertaining to :

- Applet : rules whether user has access to OGA's components that feature search-result pop-ups, for instance when doing posting searches. This right is set better set to (at least) 'View' for each OGA user ;

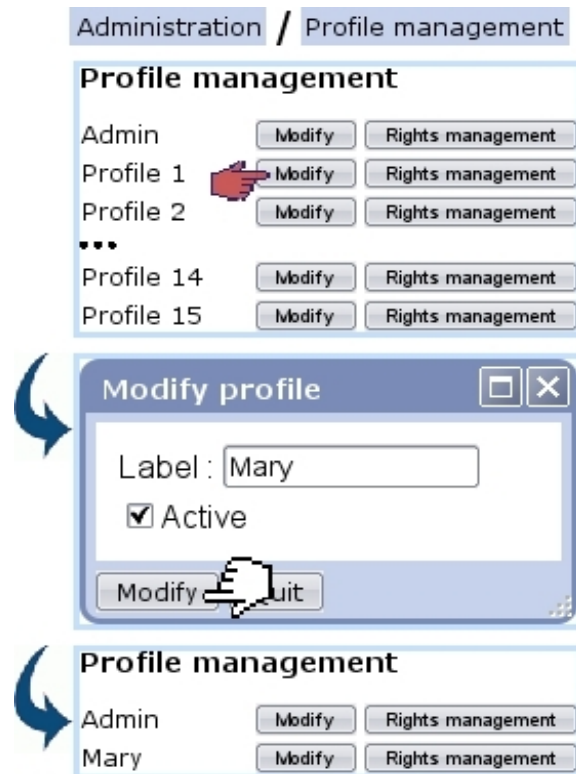


Figure 6.19: On OGA, 'Profile 1' is now changed to 'Mary'.

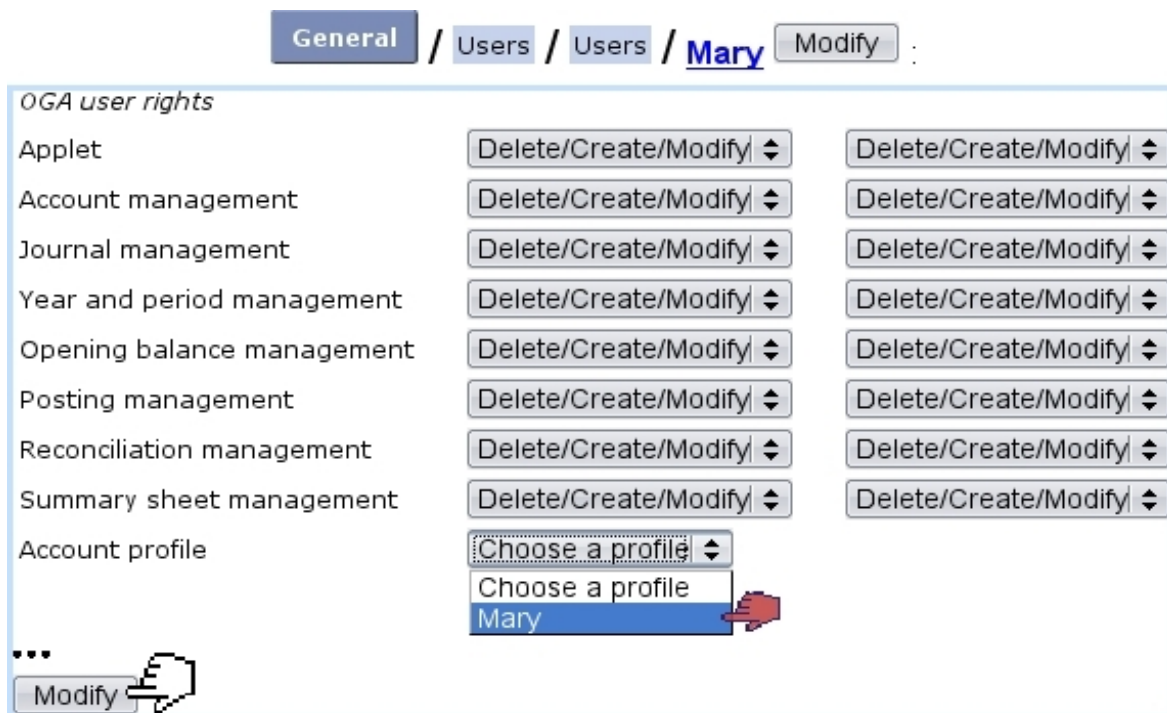


Figure 6.20: User Mary is given OGA rights and is also assessed the OGA profile as created for her.

- Accounts (generally speaking : 6.5.3.1 ; rights for individual accounts can be set

separately, 6.5.1.2) ;

- Journals (6.5.4) ;
- Year and period (6.5.5) ;
- Opening balance (6.5.5.2) ;
- Postings (6.5.6.2) ;
- Reconciliations (6.5.6.7) ;
- Summary sheets (6.5.8).

### 6.5.1.2 Setting a user's rights on accounts

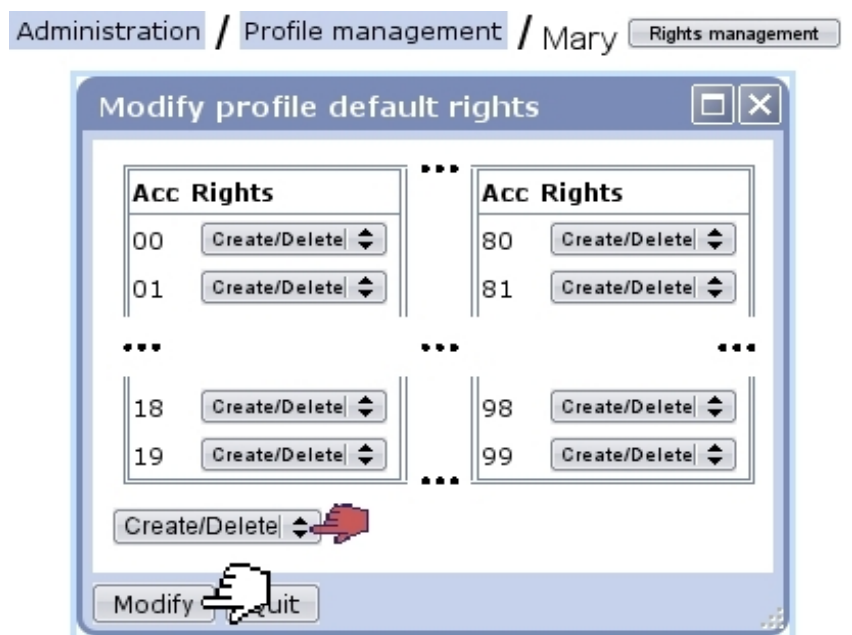


Figure 6.21: Setting full rights to user Mary on all account numbers.

These rights are to be set through **Rights management** as available from the page displayed at Fig.6.19 above. As seen on Fig.6.21, a pop-up window numerically lists accounts from 00 to 99, with for each the possibility to assess rights. For instance, concerning '31' :

- setting it to 'None' : accounts beginning by '31' will be invisible to user ;
- setting it to 'View' : accounts beginning by '31' will appear to user, but s/he will not be able to achieve any action on them ;
- setting it to 'Post/Modify' : user will be able to do postings on accounts beginning by '31' and also modify them ;
- setting it to 'Create/Delete' : all of the latter, plus user will be able to create accounts beginning by '31' and delete them.

The menu at the bottom-left of this pop-up window can be used to set all 100 rights to any value.

## 6.5.2 First time using OGA

The following describes what has to be done first when starting using OGA.

### 6.5.2.1 Opening the accounts

If you are using OGA for the first time, no accounting year and no accounts have been defined yet.

These steps are to follow :

- Going through **Accounts** / **Definition** leads to the page where a new accounting year is opened :



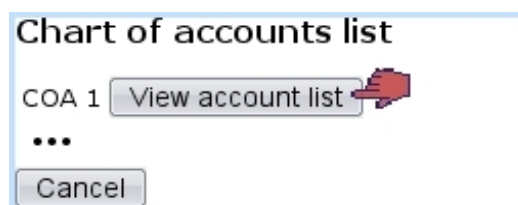
**Open new year**

Date : 1 - January - 2009

to : 31-12-2009

Create

- then, you will be lead to a Chart of Accounts (COA) list :



**Chart of accounts list**

COA 1 View account list

...

Cancel

...where clicking on the **View account list** button right to a particular COA will display the accounts it holds (6.5.9) :



**Load account list**

**Account list**

1 Account 1

...

7 Account 7

OK Cancel

- you can there uncheck or check the accounts you want to be featured ;

- by finally validating by  you are now able to define further accounts, as described at 6.5.3.1.

If you do not wish to download any chart of account, simply click on the  button as available at the bottom of the chart of accounts list.

The downloading of a COA also sets special accounts (6.5.3.2.1), though you might want to re-set your own.

### 6.5.2.2 Creating the journal for the current year

Once the accounts have been dutifully defined as previously explained, create one (or several) journal(s) for the current year as described in 6.5.4.

The previous step as described above automatically creates Opening, Closing (6.5.4.1) and Shop-to-Accounting journals (6.5.4.2).

## 6.5.3 OGA Accounts

How to manage accounts, from creation to search matters is exhaustively described in the following.

### 6.5.3.1 Adding of accounts

With OGA first settings done as described in 6.5.2, it is possible to create as many accounts as necessary, through  / .

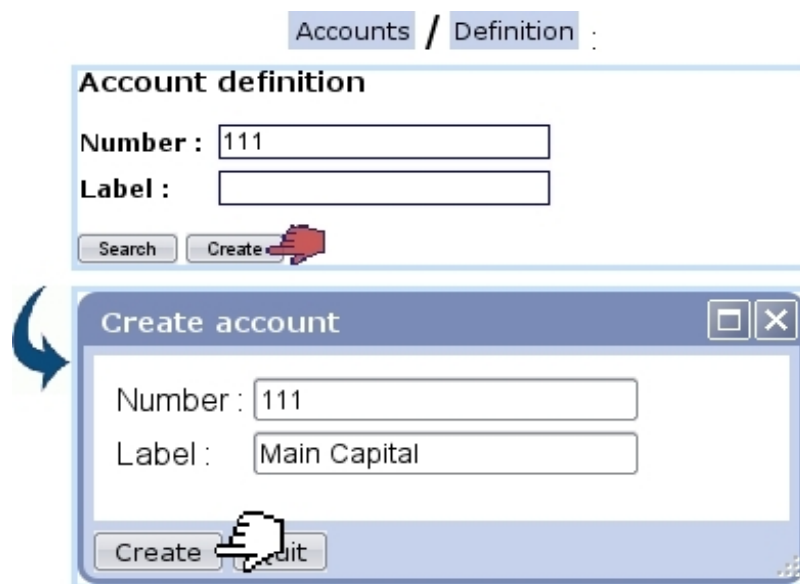


Figure 6.22: Creating a new account.

As shown in Fig.6.22, type a specific account number in the 'Number:' field ; you may want to verify its availability first by  : it will display already-existing accounts that begin by this number (see 6.5.3.4 for details about looking for accounts). If it is unused,  make appear a pop-up window where this new account's label is filled.

Its type (Balance Sheet or Income Statement - and for the latter, whether Expenses or Revenue) is automatically set by Blue Chameleon according to the first digits entered.

#### 6.5.3.1.1 OGA accounts and accounts used in Blue Chameleon context



*If you plan to use the export functionalities of the External System context as described in 6.1.2 to import to OGA everything pertaining to invoices, payments,... it is mandatory that in the context of OGA you define accounts matching those defined while in the External Accounts context (6.1.1), and vice-versa.*

#### 6.5.3.2 Properties of accounts

An account has the following properties :

- whether it is a normal account or a special account (6.5.3.2.1) ;
- whether it featured in the Balance Sheet or the Income Statement (and in that case, whether it belongs to Expenses or Revenue) ;
- how the postings (6.5.6.2) on this account deal with VAT (6.5.6.1) : if it will never be associated with one, or if VAT is optional, or if VAT is to be mandatorily chosen.

These three properties are inherited from the Chart of Accounts as loaded when OGA's very first use (6.5.2.1) ; for instance, an account '4001' will inherit of the properties of the nearest account as proposed in the Chart of Accounts : there checking first the existence of a '4001' account, then (if it does not exist) the existence of a '400' account... ; the '4' account being set as the bottom line.

These properties can of course be modified afterwards (6.5.3.3).

**6.5.3.2.1 Special accounts** When re-evaluating the results either through the dedicated menu element (6.5.5.1) or while displaying summary sheets (6.5.8.3), the Credit-Debit difference is calculated for both the Balance Sheet and the Income Statement and subsequent results are written unto two special accounts, either as previously downloaded via a Chart of accounts (6.5.2.1) or created and then modified (see below) through the 'Special :' menu.

To perform those operations, these accounts are thus necessary.

### 6.5.3.3 Modifying account's properties

As pictured in Fig.6.23, an account's properties (6.5.3.2) as well as its label (but not its number) can be modified anytime.

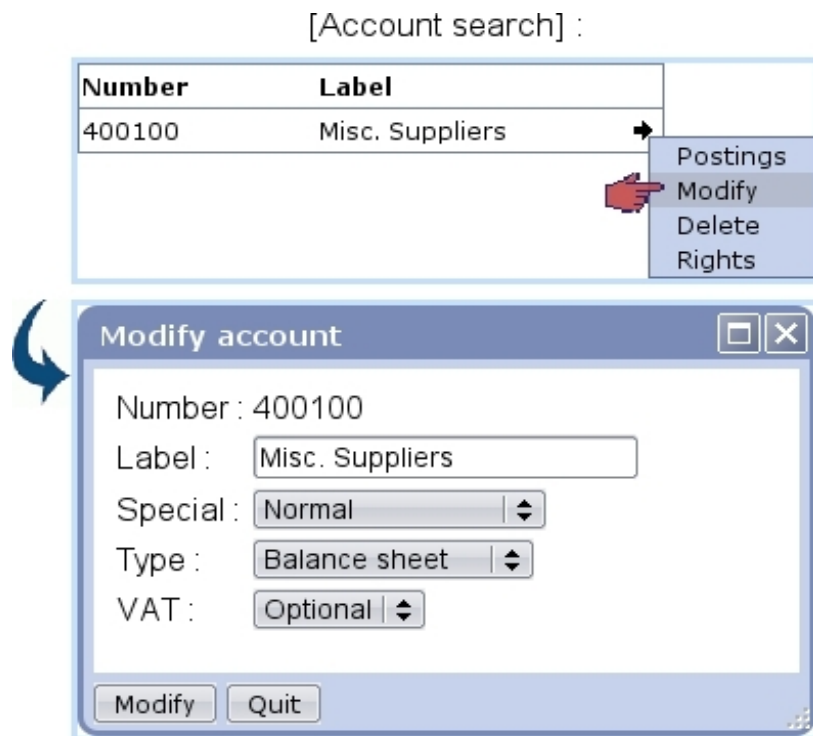


Figure 6.23: These account properties are modifiable.

It is to note that the special accounts associated with the Balance Sheet and the Income Statement are unique for each ; thus, wanting to change the number of either special account requires first to change previous account to 'Normal'.

### 6.5.3.4 Looking for accounts

Various search options ensure to always be able to locate an account.

**6.5.3.4.1 Search by number and/or label** Existing accounts can be search in different ways, first via **Accounts** / **Definition** / **Search**, which, as displayed for instance in Fig6.24, with '1' in the 'Number:' field, displays all accounts beginning by '1'.

Also, a similar search can be achieved this time on the account's label, by entering its first letters (or its full name) in the 'Label :' field.

**6.5.3.4.2 Search by number range** In addition to this, **Accounts** / **List** makes it possible to look for accounts which numbers stand in a defined range, for example from



Accounts / Definition :

**Account definition**

Number :

Label :

Number	Label	➔
111	Main Capital	➔
113	Secondary Capital	➔

Figure 6.24: Looking for all accounts beginning by '1'.

Accounts / List :

**Account list**

Account :

to :

Number	Type	Label	➔
400100	Suppliers	Misc. Suppliers	➔
400101	Suppliers	Phone Company	➔
400102	Suppliers	EZ Cleaners	➔
400103	Suppliers	Blue Lotus Catering	➔

Figure 6.25: Viewing accounts belonging to a certain range.

'400' (included) to '401' (not included) (Fig.6.25).

The 'Type' as displayed there is inherited from the Chart of Accounts as downloaded during OGA's very first use (6.5.2.1).

On this page, an  button is also available in order to export the result list as a CSV file.

### 6.5.3.5 Managing accounts

On a list of accounts as displayed after an account search 6.5.3.4.1, a single click on ➔ right to each of them (or a right click on the account line) displays this small menu (Fig6.26).

The following actions are possible :

- **Postings** displays in a pop-up window all the postings done on this account (6.5.3.6) ;

[Account search] :

Number	Label
111	Main Capital

Postings  
Modify  
Delete  
Rights

Figure 6.26: This menu enables to take dedicated actions on one specific account.

- **Modify** can be used to change this account's properties (6.5.3.3) ;
- this account can be also **Delete**'d ;
- finally, **Rights** related to this account (6.5.1.2) can be changed.

### 6.5.3.6 Postings on a specific account

Accounts / Posting search :

**Posting search**

Account :  ? Bernie K.

Date :  to :  by :

Postings :

Year :

VAT :

↓

**Posting list**

Account	Value date	Posting date	Journal	Reference	Label	Debit	Credit
410102	29/03/2010	29/03/2010	JO10	Sale #1234	SL-1234	100.00	0.00

[Right-click] :

Counterpart  
Reconciliation  
Modify  
Print  
Back

Debit: 100.00  
Credit: 00.00  
Balance: -100.00

Figure 6.27: Looking for postings done on a specific account.

It is possible, via **Accounts** / **Posting search**, to get the list of postings achieved on a specific account, as displayed on Fig.6.27. Search criteria include :

- account number ;
- date range, with ordering by either value date or posting date ;
- the displaying of all postings, or either only the reconciled (viz. un-reconciled) ones (6.5.6.7) ;
- the year : current, previous, or all ;
- an associated VAT (6.5.6.1), or any of them, or no associated VAT.

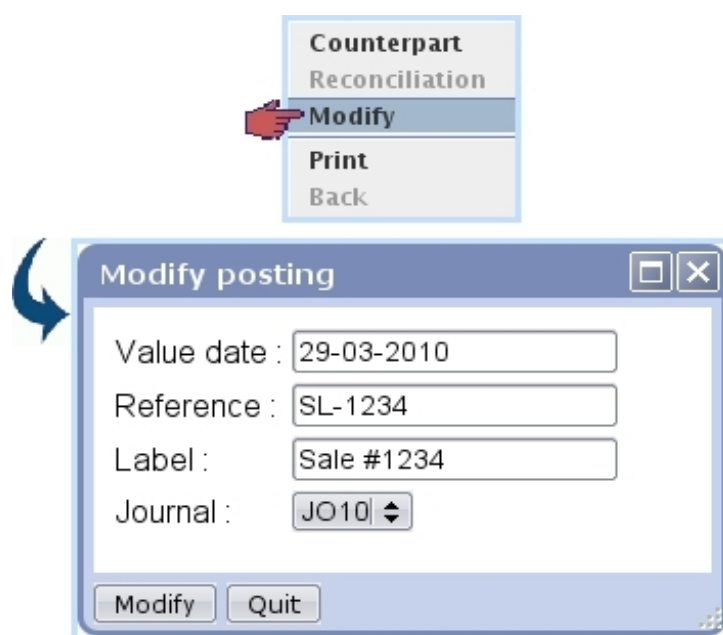


Figure 6.28: The value date, reference, label and journal for a specific posting can be modified.

The subsequent pop-up window lists all the postings made on this account ; it is possible to displace the view columns ('account', 'value date', 'label',...) and fix their width with the mouse just like a standard file explorer. What is more, a right-click on the line of a particular posting displays a small menu allowing to do the following :

- display the corresponding **Counterpart** ;
- if applicable, show any related **Reconciliation** that may have been performed on this posting (6.5.6.7) ;
- **Modify** this posting in the way illustrated at Fig.6.28 ;
- **Print**, displaying this particular posting as a printable PDF.

Finally, a **Print** button at the bottom-left of the pop-up windows (or a similar one at the former search page) displays the search results - all postings - as a printable PDF.

### 6.5.3.7 Looking for balances

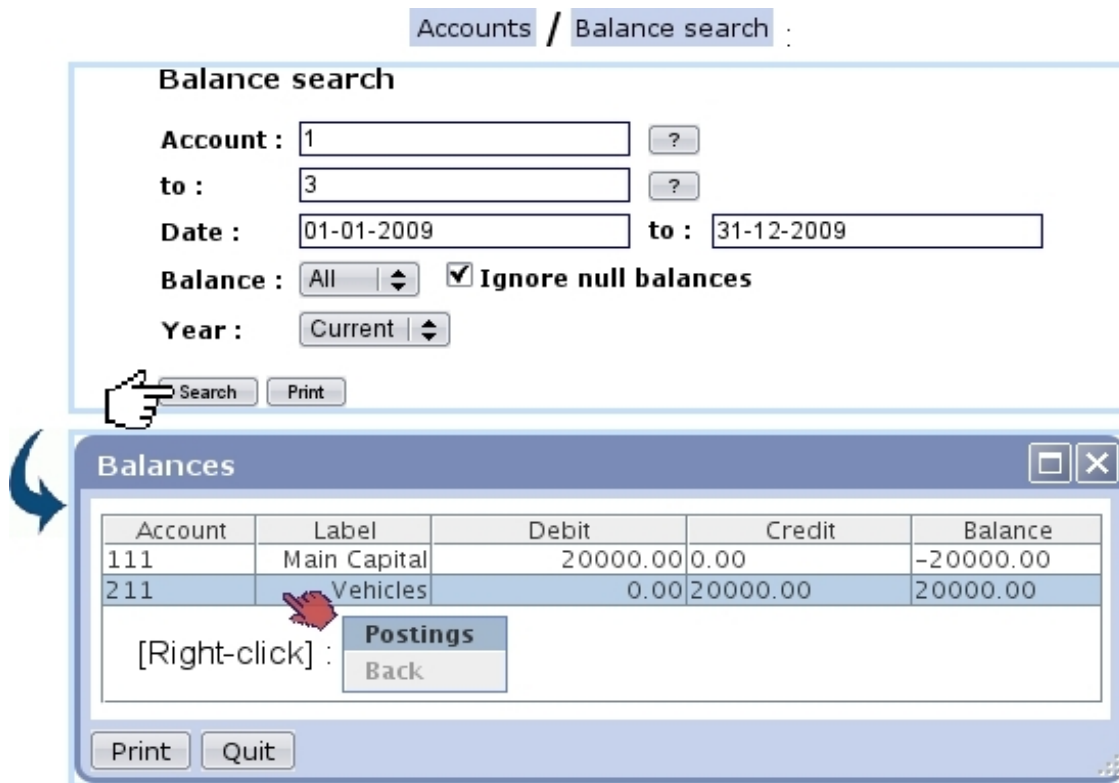


Figure 6.29: Viewing the balances on a specific account range.

Balances can be displayed for account ranges and date via **Accounts / Balance search**, as displayed in Fig.6.29.

There, the following search criteria are inputted :

- the range of accounts in between which to search balances ;
- a date range ;
- all balances, or either debit or credit ;
- whether null balances are shown or not ;
- the year, which in the case of Current or Previous must match the above date range ;
- an associated VAT (6.5.6.1), or any of them, or no associated VAT.

A right-click on a line of this pop-up window shows a small menu where it is possible to display the corresponding postings, in a similar way as described in 6.5.3.6.

Also, a **Print** button at the bottom of this pop-up window (or a similar one at the former search page) can be clicked on to display these balance results in a PDF file.

## 6.5.4 Journals

A defined journal is necessary to do postings. In order to create one, go through **Options** / **Journals** / **Add**. On subsequent pop-up window as featured in Fig.6.30, it is possible to **Copy** the rights from another journal, fill in labels and choose the year ('this year' or 'any') this new journal will correspond to.

Also, the type of this new journal is picked amongst four options ('General', 'Opening balance', 'Opening/closing balance' and 'Shop to general accounting') and modifications/reconciliations on journal's movements can be authorized or not.

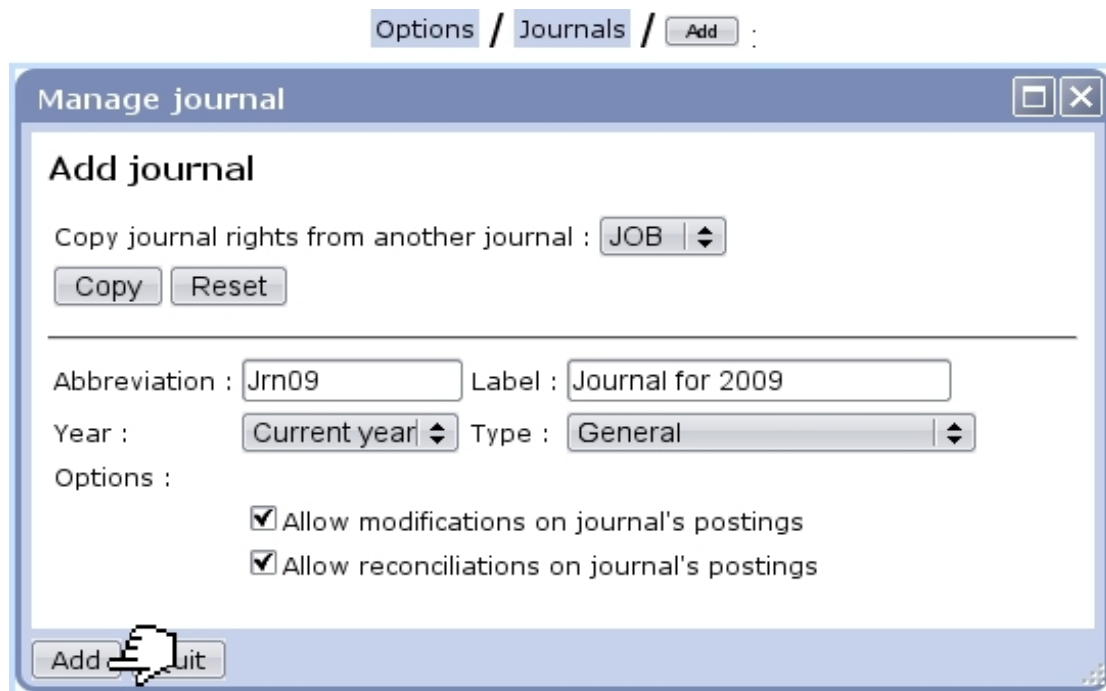


Figure 6.30: Creating a new journal for year 2009, of the 'General' type, with authorized modifications and reconciliations.

Several journals can be created for the current year ; the choice between them will be proposed while doing postings (6.5.6.2). On this list of journals, only the journals for the selected year (6.5.5.3) are shown.

After its creation, if no posting has been done in it, it is possible to **Modify** any property of a journal or even **Delete** it. If postings have been made, it cannot be deleted and the only modifications that can be done to it are label and small label changes.

### 6.5.4.1 Opening balance and closing balance journals

**By OGA's first use, default opening balance and closing balance journals are created ; they are used in order to respectively do opening balances/opening a new year**

(6.5.5.2/6.5.5.6) and closing the current year/re-evaluating results (6.5.5.5/6.5.8.3).

#### 6.5.4.2 The 'Shop to general accounting' journal (JSTA)

Whenever an export to External System is made, whether manually (6.1.2) or automatically (6.1.3), the various transactions are imported to OGA on the JSTA journal, which is yearless.



*For exports to be properly made, it is necessary that accounts as defined and used in the External System (6.1.1) match the ones defined in OGA (6.5.3.1).*

As an example, Fig.6.31 shows a posting and its counterpart (6.5.3.6) as imported from the External System.

[Posting Search, with displayed counterpart] :

Account	Value date	Posting date	Journal	Reference	Label	Debit	Credit
101	30/04/2009	30/04/2009	JSTA	FB15	Cheddar Crackers Box - Weston Max	0.00	20.00
411	30/04/2009	30/04/2009	JSTA	FB15	Invoice #2009043001001 - Weston	20.00	0.00

Debit: 20.00  
Credit: 20.00  
Balance: 00.00

Figure 6.31: This OGA posting and its counterpart correspond to a previously-made invoiced order automatically imported to OGA thanks to the External System.

By OGA's first use, such a journal is created by default.

### 6.5.5 Time matters

As accounting is an activity with a strong time-related aspect, OGA provides functions to easily manage years and periods.

#### 6.5.5.1 Re-evaluating results

Via **Options** / **Re-evaluate results**, balance is re-equilibrated for the current year.



*In order to do a re-evaluation of results, the following have to exist :*

- *an 'Closing Balance' journal (6.5.4.1) ;*
- *special accounts (6.5.3.2.1) to which put the evaluating of Assets-Liabilities and Revenue-Expenses differences.*

### 6.5.5.2 Opening balance

As featured on Fig.6.32, via **Options / Opening balance**, it is possible to update the opening balance of the current selected year (chosen as described at 6.5.5.3) and if wanted, update the years that follow.



Figure 6.32: Updating the opening balance of the current selected year.



*In order to do an opening balance, an 'Opening Balance' journal (6.5.4.1) has to exist.*

### 6.5.5.3 Changing current year

Through **Options / Change year** it is possible to change the year on which transaction postings are made. As shown at Fig.6.33, years (until the highest year that has been added as shown in 6.5.5.6) are listed and selected via a click.

### 6.5.5.4 Closing current period

The current period can be closed via **Options / Close period**.

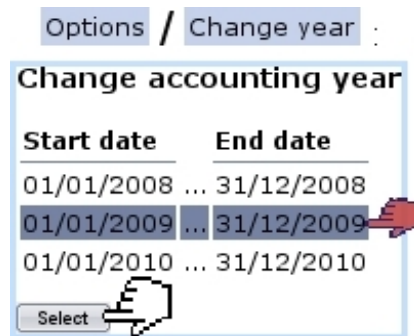


Figure 6.33: Changing the current year to 2009.

#### 6.5.5.5 Closing current year

The current year can be closed via **Options / Close current year**. **After this operation, no postings can be done on this year anymore.**

#### 6.5.5.6 Opening a new year

Via **Options / Open next year**, a new year can be opened, and for that matter, the next year. Also, at the very first use of OGA (6.5.2.1), you will be first led to this screen in order to open the current year.

### 6.5.6 Postings

How to create transactions in OGA and the general aspects surrounding them are described below.

#### 6.5.6.1 VATs

When adding a transaction on an account, OGA features the automatic adding of a VAT line if that account has at least 'Optional' or 'Required' for its VAT property (6.5.3.3). Then, on the screen to create a transaction as illustrated below, a 'VAT : ' menu then appears, featuring the taxes that have been defined at 6.3.2.



For a VAT to appear in the menu, it is mandatory that VAT accounts as defined in the OGA environment (6.5.3.1) and those created in the External Accounts environment (6.1.1) correspond to each other :

- an external account '44572' labeled '44572 - Euro-VAT 6%' had been defined ;



- it was then associated to a new tax code (Fig.6.15) ;
- an OGA account '44572' is created.

...then : in the Posting environment, the tax '44572 - Euro-VAT 6%' will be available, and movements will be written on OGA account 44572.

### 6.5.6.2 Adding a transaction

Postings / Add transaction :

**Add general transaction :**

Ref :  Date :  Journal:   Period: 3

Label :

Account number :   Bernie K.

Debit Amount :  VAT:

Credit

Account number	Label	Debit	Credit	VAT

**0.00**


Account number	Label	Debit	Credit	VAT
410102	Sale #1234	100.00	00.00	6%
44572	Euro-VAT 6%	6.00	00.00	-

**-106.00**


Figure 6.34: Recording a debit transaction line on account '410102' : the corresponding tax line is calculated and added automatically.

Through **Postings / Add transaction**, it is very easy and straightforward to add a transaction. As shown on Fig.6.34, several things are inputted :

- optionally, a mail document (7.7) can be attached to the transaction through the  button (6.5.6.3) ;
- a reference 'Ref:' for this transaction, along with the date, which also can be chosen by clicking on the calendar icon ;
- the journal (6.5.4) it will be written to, set automatically to the journal of the selected year (see 6.5.5.3 on how to change it) or leaving the choice between several journals for the selected year if more than one journal has been created for this year ;

- a label for this transaction ;
- if inputed account's property for VAT (6.5.3.3) is either 'Optional' or 'Required', a tax menu (6.5.6.1) ;
- the account number (6.5.3.1) this transaction line is done unto ; if unsure,  displays a small account search tool by beginning number/label similar to the one explained above ;
- the Debit/Credit toggle ;
- the amount of the transaction line.

**Add general transaction :**

Ref :  Date :   Journal:   Period: 3

Label :

Account number:    Sales

Debit Amount:

Credit

Account number	Label	Debit	Credit	VAT
410102	Sale #1234	100.00	00.00	6%
44572	Euro-VAT 6%	6.00	00.00	-
<b>-106.00</b>				

---

Account number	Label	Debit	Credit	VAT
410102	Sale #1234	100.00	00.00	6%
44572	Euro-VAT 6%	6.00	00.00	-
700	Sale #1234	00.00	106.00	-
<b>0.00</b>				

Figure 6.35: The counterpart has been recorded in a similar way as above (on the corresponding counterpart account and 'Credit' chosen instead of debit) and balance is therefore null : posting can be validated.

Its counterpart is then registered in a similar way by entering the counterpart account ; as shown on Fig.6.35, the balance is null and therefore transaction can be validated by clicking the  button a last time.

Once inputed, a line can be modified in any possible way (account, amount,...) via a double-click.

Has a mistake been done in a line, it is possible to suppress it by single-clicking on corresponding line (thus marking it with a ✓) and clicking .

### 6.5.6.3 Adding a mail document to a transaction

Many transactions stem from the receiving of an invoice (e.g. from suppliers) or are related to some received or sent paperwork. As Blue Chameleon already handles the management of paperwork (7.7) by allowing to upload sent/received scanned documents, OGA enables to attach the relevant document to a transaction so as to make accountancy more transparent.

Fig.6.36 shows the process of selecting a mail document to attach it to a transaction. **There, only untreated (7.7.6) documents of the 'Accounting' type (7.7.7) are shown.** [In Development]



Figure 6.36: Like reference, date and journal, this document will be a property of this transaction.

After selection, if needed, document can be removed anytime before transaction is validated through the  icon.

Upon successful validation of the transaction, document becomes flagged as treated.

### 6.5.6.4 Accounting documents to be treated

The need to record a transaction based specifically on a document can arise ; through a dedicated page, still-untreated mail documents of the 'Accounting' type can be shown ; clicking one then leads to the page for recording a new transaction, with this very document conveniently pre-selected :



### 6.5.6.5 Interim postings

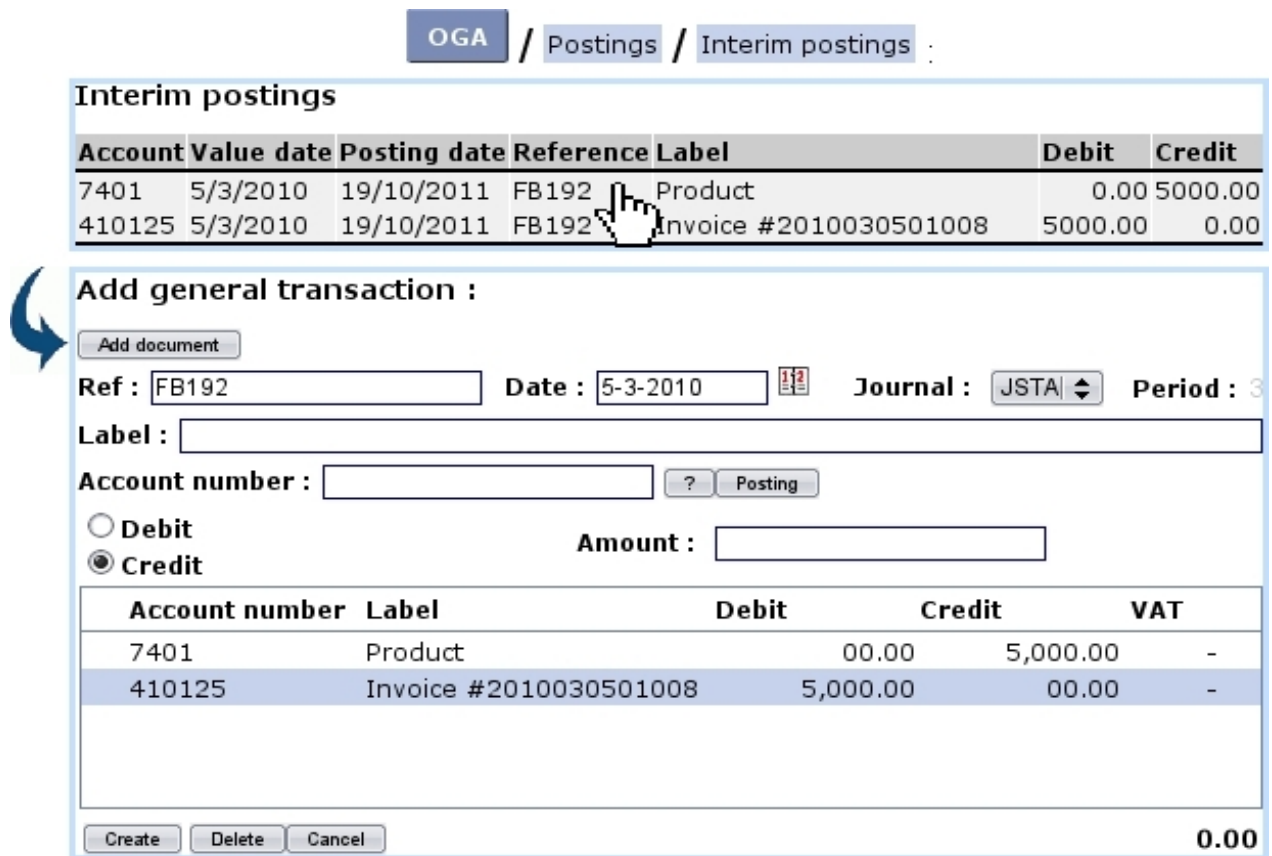


Figure 6.37: An 2010 invoice, that was not exported on time, is properly recorded in OGA.

Sometimes, invoices and payments as registered through Blue Chameleon might not be exported (6.1.3) to OGA in time, i.e. their value date stands in a closed accounting year (6.5.5.5).

For that matter, OGA provides a list of exported invoices and payments that stand before the opened accounting year, leaving all room to then process them accordingly to new dates.

Fig.6.37 shows an example of a stranded transaction, i.e. a 2010 invoice that was not exported when OGA's 2010 was opened. This transaction is clickable as a whole and then leads to the page for recording a transaction, with all the items already filled.

It is then enough to change the date (to conform to current accounting year) and click **Create** to at last create the transaction in OGA. The pre-selected journal is the Shop-To-Accounting JSTA (6.5.4.2).

Upon success, the interim postings will have disappeared from this interface.

### 6.5.6.6 Looking for postings

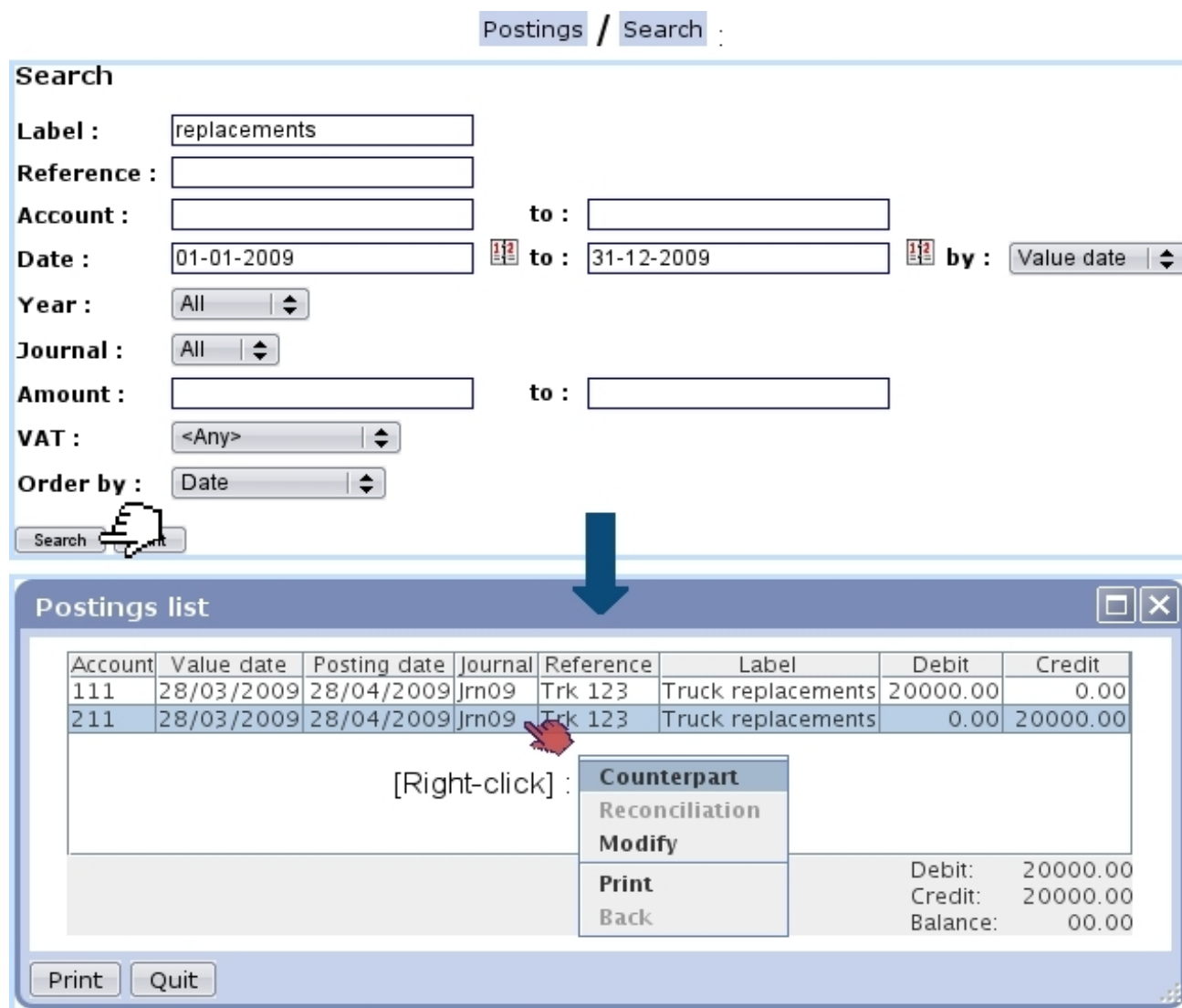


Figure 6.38: Looking for transactions containing 'replacements' and displaying them.

A posting search tool, as featured at Fig.6.38, is available through **Postings / Search** : it provides diverse search criteria, such as, amongst others :

- the transaction label or reference pattern ;
- the account range and amount range ;
- the date span ;
- a specific journal (6.5.4) ;
- an associated VAT (6.5.6.1), or any of them, or no associated VAT.

Search results are then displayed in a pop-up window similar to the one in Fig.6.27, concerning posting searches on a specific account.

Postings / Search /  :

Retail Food Company		Posting list - all VATs ,accounts 0-9,01/01/2009-31/12/2009					28/4/2009 14:47	
Value date	Posting date	Account	P.	Ref.	Jrnl	Label	Debit	Credit
28/03/2009	28/04/2009	111	3	Trk 123	Jrn09	Truck replacements	20,000.00	0.00
28/03/2009	28/04/2009	211	3	Trk 123	Jrn09	Truck replacements	0.00	20,000.00
<b>Total debit</b>								<b>20,000.00</b>
<b>Total credit</b>								<b>20,000.00</b>
<b>Total balance</b>								<b>0.00</b>

Figure 6.39: An extract of the PDF file that can be generated through a posting search..

A right-click on a particular posting shows the same small menu as described in 6.5.3.6 for posting searches on a specific account.

It should also be noted that a PDF file (an extract of which is shown at Fig.6.39) of the corresponding search can be obtained through the  button, at the bottom of this pop-up window (or a similar one at the former search page)

### 6.5.6.7 Achieving reconciliations for an account

This operation is achieved via  / . A usual account search tool displays accounts, and via , a list of all postings done on this account is displayed, in the way shown at Fig.6.40.


Then, by clicking on postings to reconcile so that total amount becomes null,  is clicked and reconciliation is achieved.

To cancel reconciliations, pick  or  in the bottom left-hand menu of the page and select the postings to de-reconcile in a similar way as above ; finally, the bottom right-hand button (now changed to ) is clicked to remove these previous reconciliations.

**Unreconciled postings**

**Number: 411**  
**Label: C Client**

Value date	Posting date	Journal	Reference	Label	Debit	Credit
30/04/2009	30/04/2009	JSTA	FB15	Invoice #2009043001001 - Weston Max	20.00	0.00
04/05/2009	04/05/2009	Jrn09	FP5	Payment #2009050401C000005 - W ...	0.00	600.00
04/05/2009	04/05/2009	JSTA	FB16	Invoice #2009050401001 - Weston Max	223.00	0.00
04/05/2009	04/05/2009	JSTA	FB17	Invoice #2009050401002 - Weston Max	377.00	0.00

 [click those three lines]


Unreconciled ▾  Previous year 0.00  Reconciliation

Figure 6.40: Achieving reconciliations on a specific account.

## 6.5.7 The General Ledger

This important document can be generated through **Postings / General ledger**, where, as shown in Fig.6.41, a year is defined.

Upon click on **Print**, a PDF file representing the General Ledger for the chosen year is automatically generated.

## 6.5.8 Summary sheets

Consisting in the Balance Sheet and the Income Statement, these documents, automatically generated by OGA, can be tailored to feature your custom selection of accounts. The main page for these, as illustrated on Fig.6.42 is accessed via **Postings / Summary sheets**.

### 6.5.8.1 Types of summary sheets

OGA's default summary sheets are called "Balance sheet" and "Income statement", but it is possible, through **Types**, to modify their names. Adding other ones (so as to create, for instance, a detailed balance sheet), as featured in Fig.6.43, is also possible.

While these two default summary sheets cannot be deleted, any other can be, provided it does not have any content.

The type of a summary sheet is always reminded by **[Balance sheet]** or **[Income statement]** right to its name.

General ledger							
Date :		01-01-2009		to :		31-12-2009	
<input type="button" value="Print"/>							
<b>111 Main Capital</b>							
28/03/2009	28/04/2009	3	Trk 123	Jm09	Truck replacements	20,000.00	0.00 -20,000.00
						<b>Balance 111</b>	<b>20,000.00</b>
						<b>Balance 11</b>	<b>20,000.00</b>
						<b>Balance 1</b>	<b>20,000.00</b>
<b>211 Vehicles</b>							
28/03/2009	28/04/2009	3	Trk 123	Jm09	Truck replacements	0.00	20,000.00 20,000.00
						<b>Balance 211</b>	<b>20,000.00</b>
						<b>Balance 21</b>	<b>20,000.00</b>
						<b>Balance 2</b>	<b>20,000.00</b>
<b>640 Wages</b>							
10/09/2009	29/04/2009	9	Sld 02	Jm09	Wages for 09	10,000.00	0.00 -10,000.00
						<b>Balance 640</b>	<b>10,000.00</b>
						<b>Balance 64</b>	<b>10,000.00</b>
						<b>Balance 6</b>	<b>10,000.00</b>
<b>702 Sold products</b>							
10/09/2009	29/04/2009	9	Sld 02	Jm09	Products, sold	0.00	50,000.00 50,000.00
						<b>Balance 702</b>	<b>50,000.00</b>
						<b>Balance 70</b>	<b>50,000.00</b>
						<b>Balance 7</b>	<b>50,000.00</b>
<b>811 Result of the year</b>							
10/09/2009	29/04/2009	9	Sld 02	Jm09	Result 09	40,000.00	0.00 -40,000.00
						<b>Balance 811</b>	<b>40,000.00</b>
						<b>Balance 81</b>	<b>40,000.00</b>
						<b>Balance 8</b>	<b>40,000.00</b>

Figure 6.41: Generating the General Ledger for the year 2009.

Summary sheets	
Type :	Balance sheet   <input type="button" value="v"/>
From :	01-01-2010 to : 31-12-2010
<input checked="" type="checkbox"/>	Re-evaluate results
<input type="checkbox"/>	Verify account list
<input type="button" value="View"/>	<input type="button" value="Print"/> <input type="button" value="Export"/>
<input type="button" value="Types"/>	<input type="button" value="Contents"/>

Figure 6.42: The Summary Sheets Page.



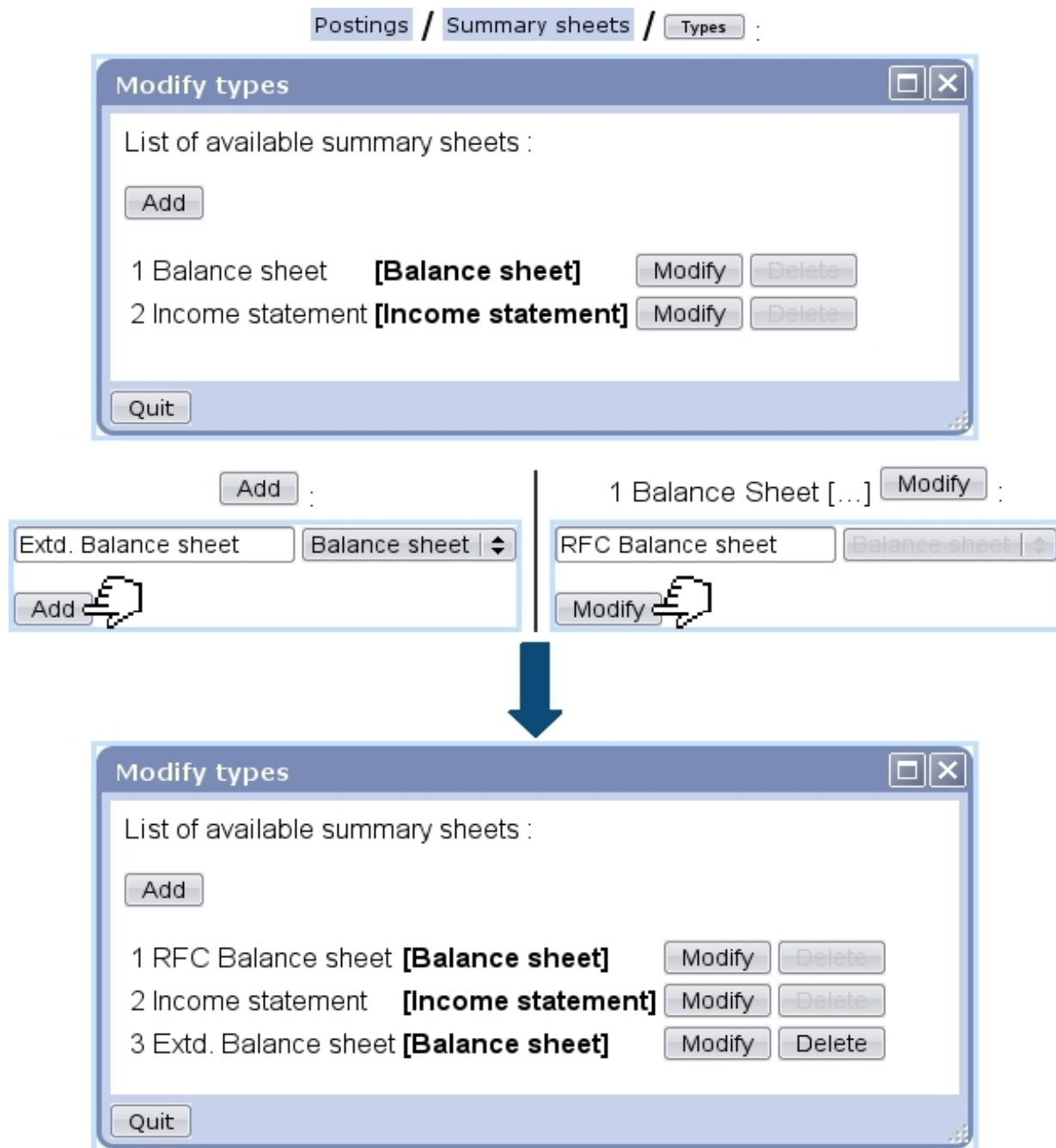


Figure 6.43: Adding a new summary sheet of the "Balance sheet" type ; modifying the title of an already-existing one.

### 6.5.8.2 Contents of summary sheets

Summary sheet contents are displayed and modified through **Contents**. A new summary sheet has the default contents as displayed on Fig.6.44.

It consists in several elements :

- a menu where all defined summary sheets are featured (6.5.8.1) ;

Postings / Summary sheets / Contents :

Summary sheet : RFC Balance Sheet

<b>ASSETS</b>	
<input type="button" value="Add new ASSETS element"/>	
Fixed assets	2#
Stocks	3#
Third-party accounts	4#
Financial accounts	5#
<hr/>	
<i>Total Assets</i>	
<b>LIABILITIES</b>	
<input type="button" value="Add new LIABILITIES element"/>	
Capital	1#
Third-party accounts	4#
Financial accounts	5#
<hr/>	
<i>Total Liabilities</i>	
<hr/>	
<b>RESULT</b>	<b>112</b>

Figure 6.44: Default contents for a Balance Sheet.

- two main parts (in this example, entitled **ASSETS** and **LIABILITIES**) ended by "Total" lines (here, *Total Assets* and *Total Liabilities*). These are not deletable, but can be modified text-wise by clicking on them ;
  - inside each part, account sums, for instance 3#, which means the total balance of all the accounts beginning by '3' is calculated and displayed. There are also ranges of sums : for instance 401#-409#, meaning the total balance of all accounts only featured in this range is calculated.
  - sub-total lines, aimed at making the total of all elements above ;
- at the very end, an overall result line consisting in Assets-Liabilities for a Balance Sheet or Revenue-Expenses for an Income Statement ; this line features in a non-modifiable way the corresponding special account (6.5.3.2.1) to which the reevaluation of the results (6.5.5.1) will be reported.

Account sums and ranges of sums are added through a  button (Fig.6.45) and afterwards can be modified and deleted via a click on them (Fig.6.46).

**6.5.8.2.1 Adding a new element** Fig.6.45 shows for instance the pop-up that is displayed upon click of the  button.

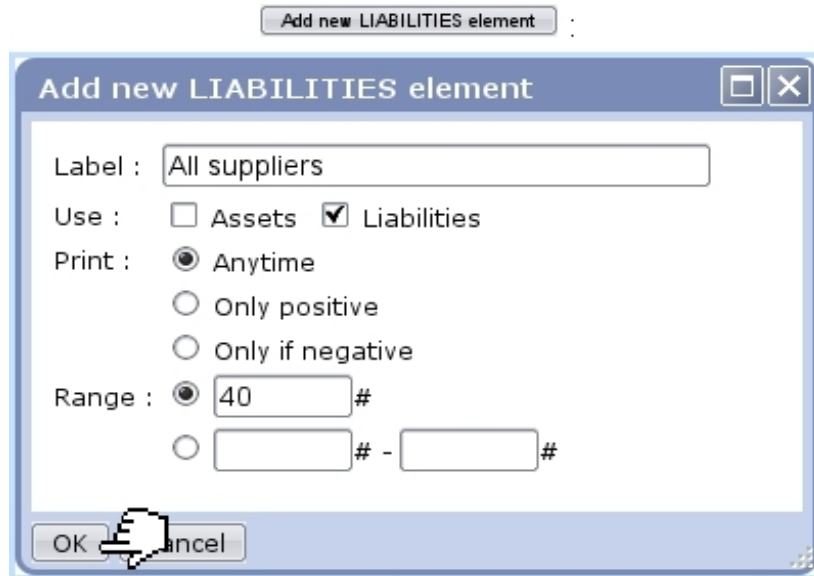


Figure 6.45: Adding a new account sum in **LIABILITIES**.

There :

- a label is given ;
- the relevant checkbox for use (here, Liabilities) is by default checked, but it can be changed if needed (for elements that are to be featured on both sides of the Balance Sheet) ;
- a toggle rules whether this element will be printed out with regards to its sign ;
- finally, whether it will be an account sum or range of sums is selected and the corresponding number/s is/are selected.

**6.5.8.2.2 Modifying an element** Fig.6.46 shows what choices are available when modifying an element (accessed by simply clicking on it).

While it is possible to modify label, use, print option and number, the nature of the element (account sum/range of sums) cannot be modified. Deletion of element is always possible via the eponymous button.

**6.5.8.2.3 Adding a sub-total** On the pop-up as featured in Fig.6.46, an **Insert total** button is available for adding a sub-total line right the below clicked line (Fig.6.47).

Sub-total lines can be modified label-wise and deleted through the pop-up as displayed on a click.

### 6.5.8.3 Displaying summary sheets

As seen on Fig.6.42, summary sheets are available in three different versions :

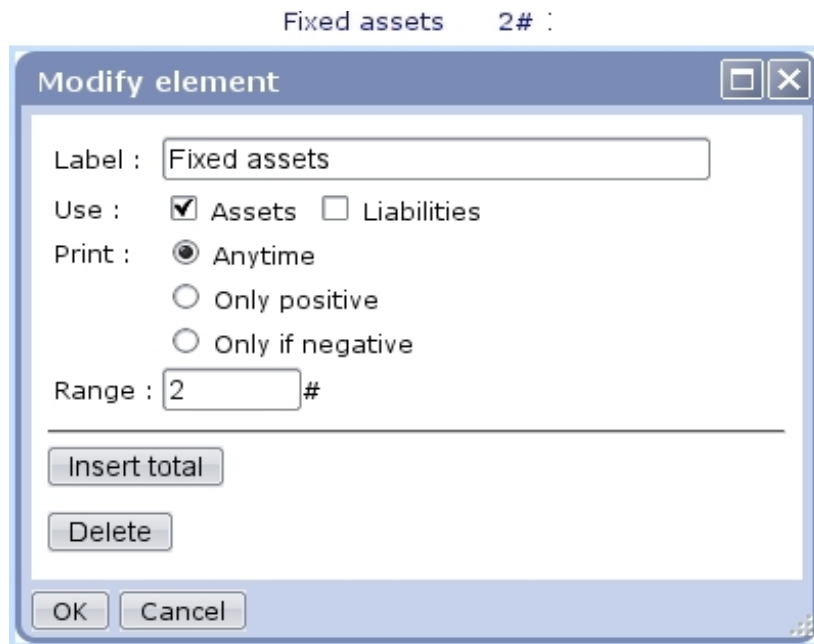


Figure 6.46: Modifying the account sum "Fixed assets".

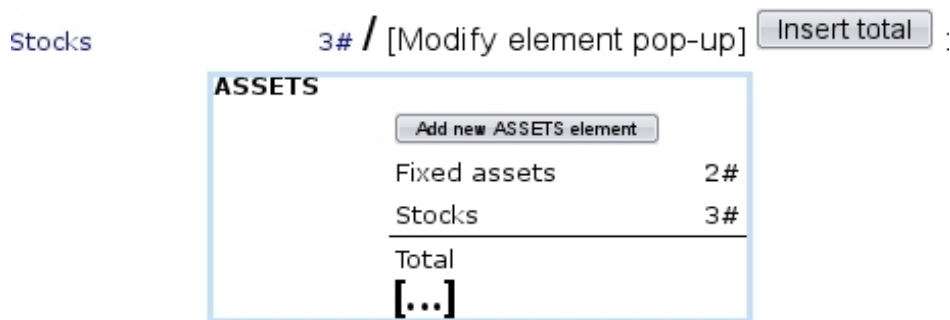


Figure 6.47: Adding a sub-total line to display sum of elements 'Fixed assets' and 'Stocks'.

- a HTML version ();
- a PDF version ();
- a CSV version (.

Fig.6.48, Fig.6.49 and Fig.6.50 then show an example of balance sheet as obtained through respectively ,  and .

Whichever the version, two checkboxes allow to :

- Re-evaluate results : will cause OGA to recalculate all amounts. **This must be checked if there were postings since the last time a summary sheet was displayed.** Special accounts (6.5.3.2.1) have to be defined for operation ;
- Verify account list : will make OGA check if some accounts are not covered by the summary sheet contents (6.5.8.2).

**Summary sheets**

Type: RFC Balance sheet ▾

From: 01-01-2010 to: 31-12-2010

Re-evaluate results

Verify account list

---

**RFC Balance Sheet 01-01-2010 31-12-2010**

**Retail Food Company**

**Assets**

⊞ 2#	Fixed assets	23,163.46
⊞ 3#	Stocks	12,564.30
	<b>Total</b>	<b>35,727.76</b>
⊞ 4#	Third-party accounts	320,376.05
⊞ 5#	Financial accounts	72,308.11
	<b>Total Assets</b>	<b>428,411.92</b>

**Liabilities**

⊞ 1#	Capital	85,596.00
⊞ 4#	Third-party accounts	242,511.78
⊞ 5#	Financial accounts	1,513.26
	<b>Total Liabilities</b>	<b>329,621.04</b>
	<b>RESULT</b>	<b>98,790.88</b>

Figure 6.48: Generating the balance sheet for the year 2010.

In the HTML version, in front of each summary sheet element, a ⊞ can be clicked to show which OGA accounts are held under it. For each displayed account, it becomes then possible, as illustrated in Fig.6.51, to display the postings that have been done this year on it as well as, thanks to clickable tabs, to see the counterpart(s) and, if any, the reconciliation(s).

### 6.5.9 Predefined Chart of Accounts (COA)

[In development]

Print :

Retail Food Company      Balance Sheet, 01-01-2010 31-12-2010      30/12/2010 10:23

<b>Assets</b>			
	2#	Fixed assets	23,163.46
	3#	Stocks	12,564.30
		Total	35,727.76
	4#	Third-party accounts	320,376.05
	5#	Financial accounts	72,308.11
		Total Assets	428,411.92
<b>Liabilities</b>			
	1#	Capital	85,596.00
	4#	Third-party accounts	242,511.78
	5#	Financial accounts	1,513.26
		Total Liabilities	329,621.04
		RESULT	98,790.88

Figure 6.49: The PDF version of the previous.

Export :

	A	B	C	D
1	TYPE	ACCOUNTS	LABEL	AMOUNT
2	Assets	2#	Fixed assets	23163.46
3	Assets	3#	Stocks	12564.3
4	Assets		Total	35727.76
5	Assets	4#	Third-party accounts	320376.05
6	Assets	5#	Financial accounts	72308.11
7	Assets		Total Assets	428411.92
8	Liabilities	1#	Capital	85596
9	Liabilities	4#	Third-party accounts	242511.78
10	Liabilities	5#	Financial accounts	1513.26
11	Liabilities		Total Liabilities	329621.04
12			RESULT	98790.88

Figure 6.50: The CSV version, as opened in a spreadsheet software.

["RFC Balance sheet", HTML version]

The screenshot shows a web interface for an RFC Balance sheet. At the top, there is a header bar with a red hand icon pointing to a '4#' button, the text 'Third-party accounts', and a balance of '17,558.05'. Below this, a list of accounts is shown, with a white hand icon pointing to the account '410102' which has a balance of '-100.00'. A blue arrow points to a 'Postings' button, which is highlighted. Below the buttons, a table displays the postings for account 410102. The table has columns for Account, Value date, Posting date, Journal, Reference, Label, Debit, and Credit. A single row of data is visible, showing a debit of 100.00 on 29/03/2010. At the bottom right of the table area, there is a summary of Debit: 100.00, Credit: 00.00, and Balance: -100.00.

Account	Value date	Posting date	Journal	Reference	Label	Debit	Credit
410102	29/03/2010	29/03/2010	J010	Sale #1234	SL-1234	100.00	0.00

Debit: 100.00  
Credit: 00.00  
Balance: -100.00

Figure 6.51: Expanding a summary sheet's element and viewing postings made on an account.






# Chapter 7

## General Tools

In this Chapter, the use of the various helpful tools we provided Blue Chameleon with will be explicated.

All commands explained in this section are accessible from the  command group.

### 7.1 News

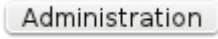

In order to broadcast miscellaneous company-related news to users, Blue Chameleon has designed a news tool that, upon login, permits user to be noticed of anything happening, as well as, should it be needed, publishing her/his own news to inform the user community about particular events that may happen.



*News access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

*[Menu script user rights :] News*

#### 7.1.1 The rights to access news and to publish news to user groups

In order to avoid news delivering to recipients that would not be interested by them, a news user possesses publishing rights for every user group that exists, being able to publish or not to users belonging to a given user group. As displayed in Fig.7.1, these rights can be set for every news user thanks to the  button found from .

News / Administration :

**News - Publishing rights**

News user : admin

---

**Publication to usergroup :**

Accounting  Yes  No

Administrator  Yes  No

Customer Support Group  Yes  No

External Relations  Yes  No

Sales Department  Yes  No

Figure 7.1: Setting admin's rights to send news to every user group.

### 7.1.2 Creating news

News creating is achieved via **News / Publish / Add news** (Fig.7.2). A title has to be filled in as well the news' text. Once **Next** is clicked on, a list of user groups displays : these are the user groups to which the publishing user is authorized to send news to, as set above. Amongst a given user group, only the users who have access to news will be displayed and thus sent news to.

News / Publish / Add news :

Title : Warning !

Comments : Electricians will be working on mains this afternoon, so there's quite a risk of power failure. Please save your work every once in a while.

---

Send to :

- Accounting(Jane; Mary)
- Administrator(admin)
- Customer Support Group(James; Karen)
- External Relations(Mary)
- Sales Department(Dick; Harry; Tom)

Figure 7.2: Writing a piece of news aimed to be sent to every user group.

Finally, clicking on  will make this piece of news ready to be published.

### 7.1.3 Publishing news

Once created, news are published directly on next screen (displayed at Fig.7.3) by clicking on the [Publish](#) link. The same screen can be accessed later via . Before publishing, news can also be verified and, if needed, modified (in the same way as during their creation) thanks to the [View](#) link.





Figure 7.3: Publishing a recently-created piece of news.

### 7.1.4 Reading news

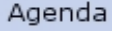
As illustrated by Fig.7.4, if the news Event Control has been setup (1.3) by the user, freshly published news will be displayed when logging in on Blue Chameleon, or when clicking on ; either way, unread news can be displayed by clicking on .



Figure 7.4: Two ways of seeing recently-published news.

The  button at the bottom of the page will mark the news as read. Once read, a piece of news can be accessed via .

## 7.2 Agenda

Blue Chameleon provides a built-in agenda designed to manage appointments with clients as well as other (customizable) types of scheduled activities ; the *Main Agenda Page* is accessed via .



*Agenda access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*


*[Menu script user rights :] Agenda*

### 7.2.1 Agenda setup guide

For an easier use of Blue Chameleon's agenda, it is advised to follow these operations to configure it :

1. creation of RV types (7.2.2.1) ;
2. creation of agendas (7.2.2.3) ;
3. editing of their styles (7.2.2.3.1) ;
4. assessing them RV types (7.2.2.3.2) ;
5. optionally, making group agendas gather individual agendas (7.2.2.3.3) ;
6. setting access rights for usergroups (7.2.2.4) and a default agenda per user (7.2.2.5).

### 7.2.2 Agenda administration

The agenda general configuration is done through the *Agenda Administration Page* (Fig.7.5), as accessed via the  button at the bottom of the *Main Agenda Page*.

#### 7.2.2.1 Defining RV types

'RV types' is the general name to qualify the various activities that are filled in the agenda timetable. Each of them can be assessed their own color in order to distinguish between

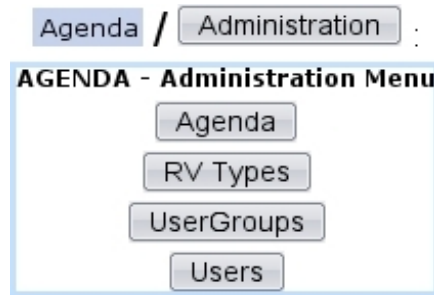


Figure 7.5: The *Agenda Administration Page*, with buttons designed to configure agenda display and rights.

them at a glance.

Creating a RV type is achieved via **RV Types**, as accessible from *Agenda Administration Page*. For instance the creation of a RV type called 'New Product Test' will be achieved in the way described at 7.6.

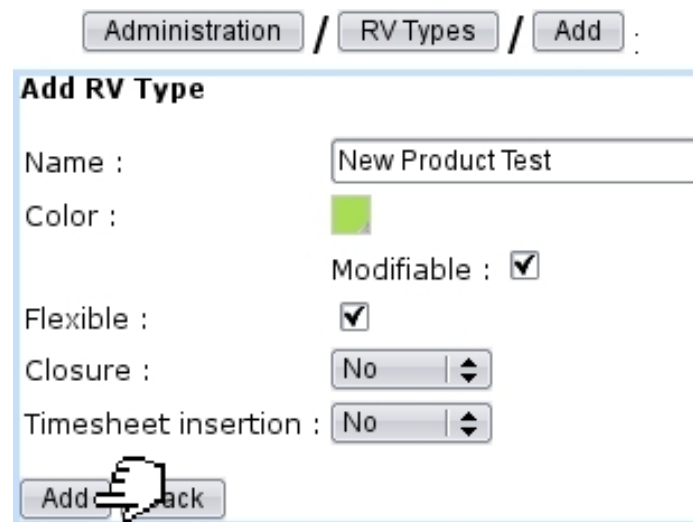


Figure 7.6: Creating a RV type called 'New Product Test'.

There, the following data (which will then shape the appointments created from this type) is inputted :

- a name for the RV type ;
- the color under which appointments of this type will appear on the Agenda (Fig.7.16) ; this color is picked through a dedicated tool (see Color Management below) ;
- whether it is flexible or not (7.2.3.4) ;
- whether the possibility is allowed to modify this (default) color when a specific appointment is modified (7.2.3.2) ;

- whether appointments of this type will have to be closed and will be inserted into Timesheets (7.2.3.6).

### 7.2.2.2 Color management

When a RV type is added as described above or when an appointment is edited (7.2.3.2), the color under which related appointment appears can be defined/updated in way shown at Fig.7.7.



Figure 7.7: Choosing a color.

There, a color can be picked amongst a predefined palette or entered as standard HEX code (in which case it is validated by pressing Return).

The colors that have been thus defined for type can afterwards be recalled on the *Main Agenda Page* through the  button :



### 7.2.2.3 Defining agendas for users or user groups

It is possible, through the **Agenda** button on the *Agenda Administration Page*, to define dedicated agendas to be used by specific users *or* usergroups. Fig.7.8 shows for instance the creation of an agenda aimed to be used by users of the 'Sales Department' user group.

The screenshot shows a web interface for agenda management. At the top, there are navigation buttons: 'Administration / Agenda / Add :'. Below this is a form titled 'Add agenda' with the following fields: 'Agenda name : Sales Dept. Agenda', 'User : <none>' (with a dropdown arrow), and 'User group : Sales Department' (with a dropdown arrow). Below the form are 'Add' and 'Back' buttons. A blue arrow points from the 'Add' button to the 'List of agendas' section below. The 'List of agendas' section contains a table with two rows: 'Admin' and 'Sales Dept. Agenda'. Each row has four buttons: 'Modify', 'Style', 'RV Types', and 'Groups'. At the bottom of the list is an 'Add' button.

Figure 7.8: Creating a agenda that will be used by user group 'Sales Department'.

Now, of course, the different users belonging to it (here, Tom, Dick and Harry) may surely different timetables and can define their own particular agendas picking this time from the 'User:' menu ; then, all of these particular agendas can be gathered into the 'Sales Dept. Agenda', described in details at 7.2.2.3.3.

The list of current agendas, as displayed after a click on **Agenda**, features possibilities to **Modify** any agenda in a similar way as during its creation (for that matter, name and/or user or user groups can be modified).

The **Style**, **RV Types** and **Groups** (this button only existing if agenda has been defined for a *user group*) buttons' functions are respectively cleared up at 7.2.2.3.1, 7.2.2.3.2 and 7.2.2.3.3 below.

**7.2.2.3.1 Editing agenda style** From the **Style** button as found at the agenda-listing page, the style for a specific agenda can be defined, as shown in Fig.7.9.

The options on this page decide for the following :

- whether appointments can be added in week-ends ;

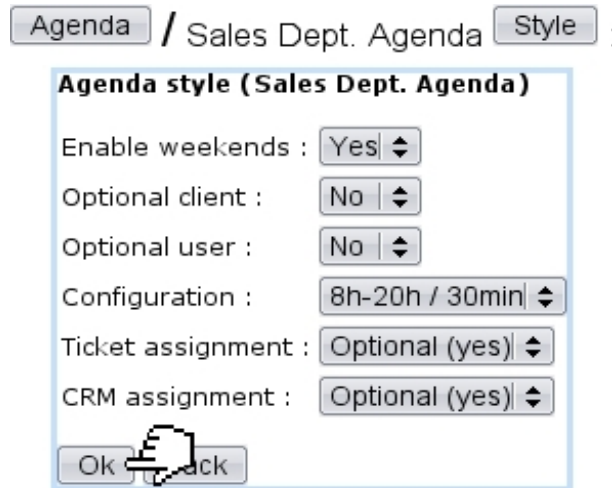


Figure 7.9: Defining the 'Sales Department' agenda style.

- if client/user can be optional for an appointment adding (7.2.3.1.1) ;
- the time configuration for the agenda display (0-24 hour span and 60 minute gaps, 8-18 hour span and 30/60 minute gaps, 8-20 hour span and 30 minute gap) ;
- whether an appointment adding creates a corresponding ticket (8) ;
- whether an appointment adding creates a corresponding Customer Relationship Manager action (7.9.4).

**7.2.2.3.2 Assessing RV types to agenda** Defined as described at 7.2.2.1, RV types must be added to an agenda in order to be used therein ; this is done through the **RV Types** button this time found at the list of current agendas (7.2.2.3).

As shown in Fig.7.10, the choice is then made between all the RV types that have not yet been added.

This way of doing (adding chosen RV types to agendas in order to be able to use them) ensures that each agenda has only its RV types of interest.

After being added, through the **Set as default** button, a RV type can then be pre-selected when agenda is used.

**7.2.2.3.3 Groups of agendas** Provided that an agenda has been defined as belonging to an user group (as in Fig.7.8), through **Groups**, it is possible to make it gather the agendas of certain users : Fig.7.11 shows for instance how the particular agendas of users Tom, Dick and Harry are added to the 'Sales Dept. Agenda' and the result of this on the *Main Agenda Page*.



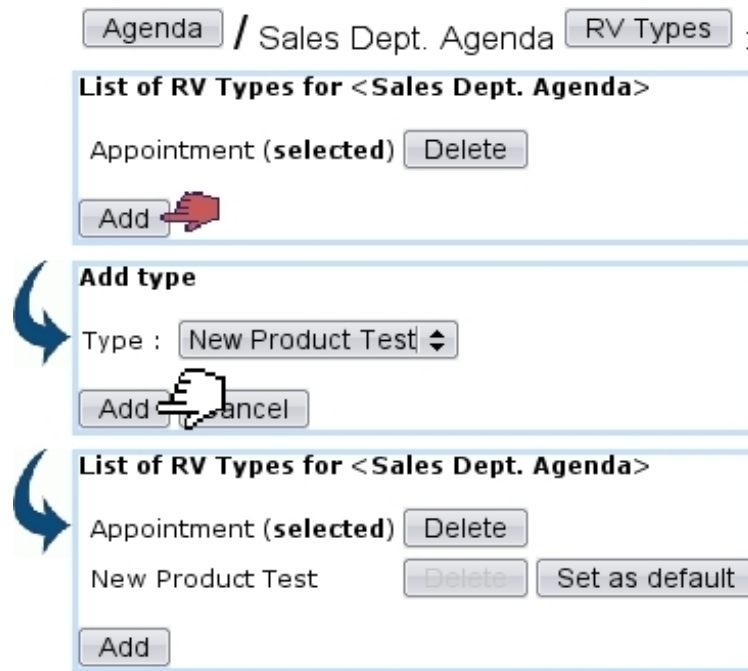


Figure 7.10: Adding the RV type 'New Product Testing' to the 'Sales Dept.' agenda.

#### 7.2.2.4 Access rights for users groups

Members of a given user group must can be assessed rights (or none) to view, modify, create/delete/modify (or all of them) the agendas of all user groups.

This is done via the **User groups** button as accessible from the *Agenda Administration Page* ; on subsequent page, the user group which rights will be set is picked, and below, all existing agendas are listed.

Fig.7.12 shows for instance the settings for the 'Sales Department' user group : it is set to 'View' only for the 'Admin' agenda, but of course assessed 'Delete/Create/Modify' rights to its own agenda, the 'Sales Department' agenda.

According to the different roles and skills of user groups, their rights may be for instance set in order to be able to view the agendas of certain usergroups.

These agendas are picked and displayed on the *Main Agenda Page*.

#### 7.2.2.5 Default agenda per user

A given user can be assessed a default agenda (provided that the user group s/he belongs to has sufficient rights to this agenda) via the last button on the *Agenda Administration Page*, **Users** . As shown on Fig.7.13, user is picked and her/his default agenda chosen.

This is the agenda that will be displayed when user arrives on the *Main Agenda Page*.

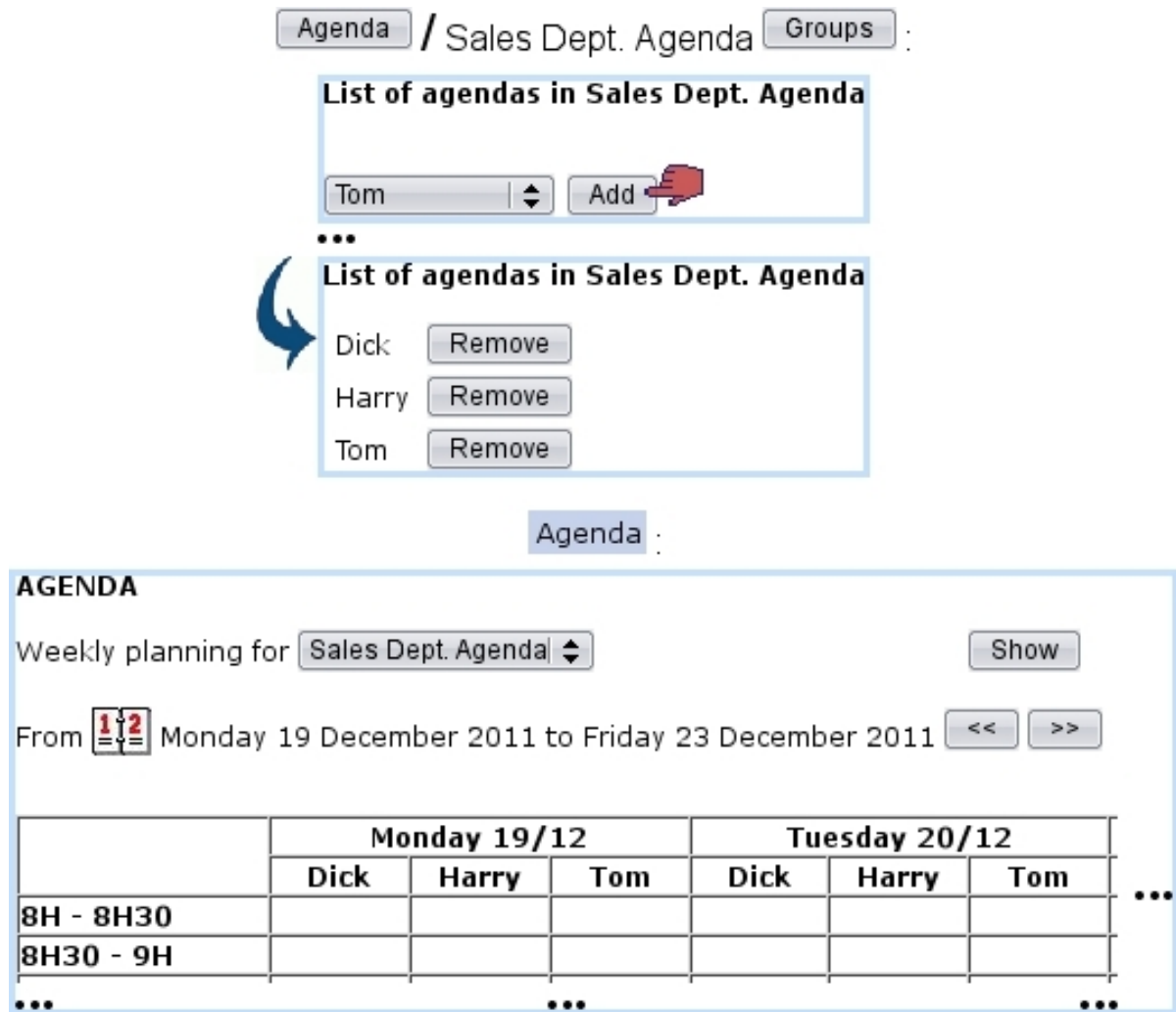


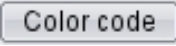
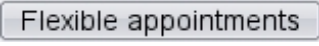
Figure 7.11: The own **agendas** of Tom, Dick and Harry are added into user-group-oriented 'Sales Dept. Agenda'; as a result, these three agendas are all featured when displaying the 'Sales Dept. Agenda'.

### 7.2.3 Agenda use

Upon arrival on the *Main Agenda Page* as displayed at Fig.7.14, a weekly calendar is displayed in the style specified at 7.2.2.3.1 : either running from Monday to Friday or Monday to Sunday, with the specified span of hours.

Week can be chosen by clicking on the  icon ; also, previous, next weeks are displayed via , .

Several buttons lie at the bottom of the page :

-  recalls in a pop-up which color corresponds to which RV type (7.2.2.2) ;
-  shows which of the week's appointments have been flagged as flexible (7.2.3.4) ;

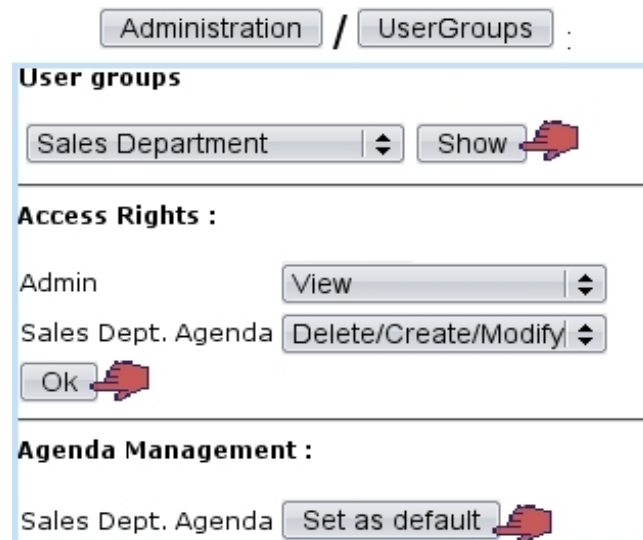


Figure 7.12: Setting the rights of a user group to agendas.



Figure 7.13: The 'Sales Department' agenda is set as Tom's default one.

- **Administration** accesses the eponymous page (7.2.2).

The list of agendas as accessible from the 'Weekly planning for' depends on the user group the current user belongs to, as set in the Agenda administration (7.2.2.4).

### 7.2.3.1 Adding an appointment

To add a new appointment, as featured in Fig.7.15, click on the intersection of the corresponding day and time. Most generally, an appointment is added for a client, but appointments for other things (7.2.3.1.1) can be added, too.

In case of a client appointment for instance, after a client search, general information upon the selected client is displayed, as well as the day and time of the appointment. The timelength can be modified, as well as the RV type to be chosen from the ones that have been assessed to the current agenda (7.2.2.3.2) ; a comment can also be added.

An alarm (7.3.4) specific to this appointment can be added by setting the 'Alarm :' menu to any other value than 'None' (in which case no alarm will be created).

If agenda style had been defined with 'optional user', s/he can be picked from the list of user belonging to this agenda's related user groups (7.2.2.3). Also according to agenda

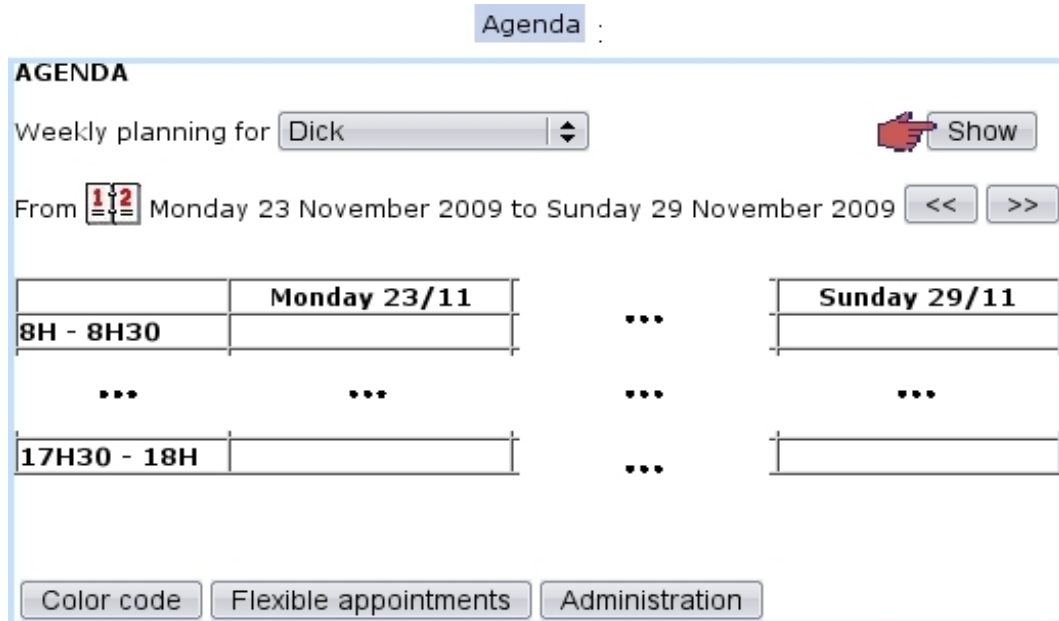


Figure 7.14: The *Main Agenda Page*.

style, tick boxes for ticket (8) and CRM action (7.9.4) assignments may be available.

The 'Flexible' checkbox serves as to flag this appointment as such, and thus being displayed in the pop-up as shown via **Flexible appointments** on the *Main Agenda Page*.

After validation, as shown on Fig.7.16 the *Main Agenda Page* displays the scheduled appointment with a color background as defined during the creation of the corresponding RV type (7.2.2.1).

Clicking on the appointment then leads to a similar page as the add one, with possibilities to modify RV type and comments ; changes are validated through the **Update** button.

**7.2.3.1.1 Appointments for other objects - or none** According to the choice made for the corresponding agenda style (7.2.2.3.1), a client can be mandatory or optional. In whichever case, an **Other object** button enables to add an appointment pertaining to an other object (Fig.7.17), for instance :

- prospects (7.9.3) ;
- other users...

Also, only if agenda style has optional client, a **No client** button is available to relate this new appointment to nothing in particular.

An example of an appointment for an other object (a user) is shown next.

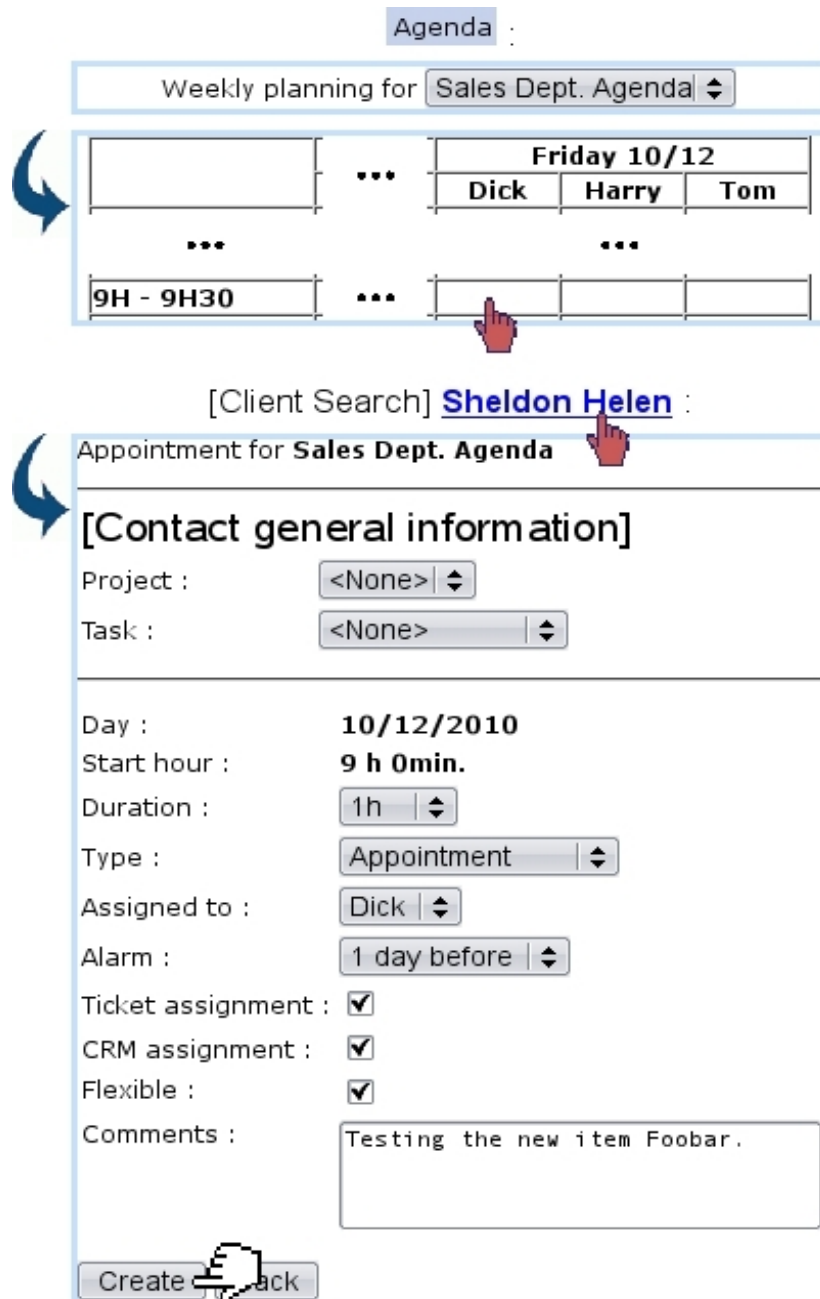


Figure 7.15: Adding an appointment for a client.

### 7.2.3.2 Modifying an appointment

After an appointment is created, it can be viewed (detail-wise) as well as modified by simply clicking on it. Then, as shown on Fig.7.18 (which by the way features an appointment made with another user), the following data can be modified :

- the type of appointment ;
- whether it is flexible (7.2.3.4) or not ;
- a 'Color : ' field which allows to modify the color (7.2.2.2) for this specific appoint-

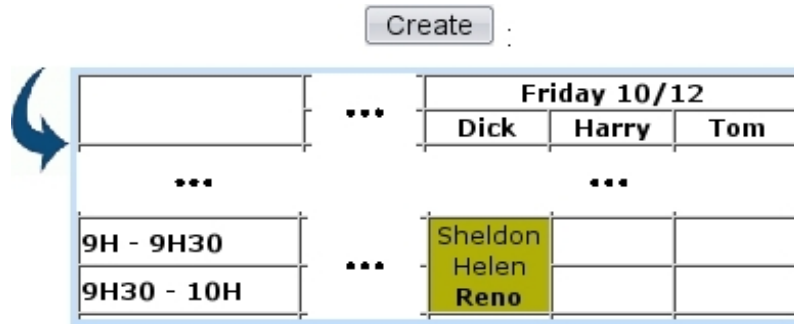


Figure 7.16: The now-scheduled appointment.

[On an Agenda which style is 'Client: optional'] :

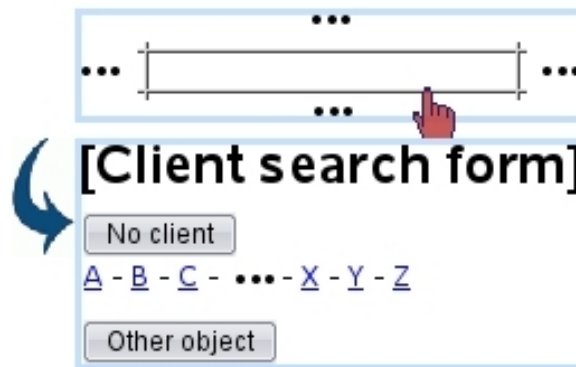


Figure 7.17: While the 'Other object' button is always available whatever agenda style is, the 'No client' one is only there if agenda style has optional client.

ment ; only appears for types that have 'Modifiable' checked ;

- whom this appointment is assigned to ;
- the comments.

On this screen, an alarm (7.3.4) for this appointment can also be added if it had not been during the creation of the appointment ; if it already exists, it can be modified, or removed by setting this menu to 'None'. These alarm operations will be done automatically.

Any change to validate is done so via the **Update** button. It is to note that, when type of appointment is changed, the flexible/modifiable color properties of the new type are shown immediately ; thus, 'Flexible' may go checked or unchecked, and the 'Color :' field may appear or disappear.

### 7.2.3.3 Moving or deleting an appointment

Once created, an appointment can be moved to another time slot by accessing the *Modify Appointment Page* (by clicking on this appointment) ; there, via a **Move** button at the bottom of the page, a calendar will be displayed again, where the new time slot will be

...

... **Thomas Hanson  
(Sales Department)** ...

...

**Planning - Appointment (156)**

Appointment : **156**

Date : **5/5/2011**

Type : Meeting

When : **17 h 0min**

Duration : **60 min.**

Flexible :

Assigned to : admin View contact...

Opened by : **admin**

Color : ■

Alarm : 2 days before

---

User name : **Thomas Hanson (Sales Department)**

Ph. number : **555 0001**

Mobile :

Email : **tom.hanson@mailserv.com**

---

Comments :

---

Update Back Delete Move

Figure 7.18: Viewing an appointment's details, which some of those can be modified.

chosen similarly as for appointment adding. Finally, appointment move is achieved via Update.

On the other hand, should an appointment be simply deleted, this is achieved via the eponymous button, also available from the *Modify Appointment Page*.

#### 7.2.3.4 Flexible appointments

Appointments in Blue Chameleon can be flagged as flexible or not by checking/unchecking the 'Flexible' checkbox while creating (7.2.3.1) or modifying (7.2.3.2) an appointment. When an appointment is flagged as not flexible, it will then appear with a \* on the *Main Agenda Page* so that it can be distinguished from flexible ones. On this very page, a Flexible appointments button displays a pop-up where all flexible appointments for the week and the current user will be shown.

Flexibility, when an appointment is created, is inherited from the corresponding RV type (7.2.2.1).

### 7.2.3.5 Reminding appointments

Provided that the Agenda event control has been enabled (1.3), as featured on Fig.7.19, appointments will be reminded while at the **Home** page.

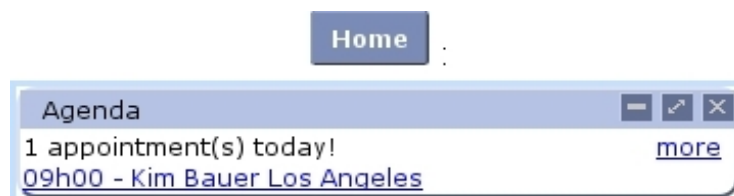


Figure 7.19: This appointment is imminent ; clicking on the [more](#) link will lead to the *Main Agenda Page* for the current week, while clicking on the link below "1 appointment(s) today !" will lead to the page for that very appointment.

### 7.2.3.6 Closure of appointments and insertion in Timesheets

[In Development]



## 7.3 Alarms

While using Blue Chameleon, a user might want to be remembered certain things in a timely matter ; for instance, anything related to things to be done before a certain date.

Blue Chameleon thus allows to set up custom alarms that will appear on user's desktop as an Event Control ; also, other objects such as Agenda appointments can also have an alarm set up so that they can be reminded before their due date.

The *Main Alarms Page* as described below is accessed via **Alarms**.



*Alarms access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

*[Menu script user rights :] Alarms*

### 7.3.1 Setting an alarm

As featured on Fig.7.20, an alarm is easily set by entering a small text and the due date.

**Add-ons** / **Alarms** / **New alarm** :

**New alarm**

Comment : Buy new toners !

Due date :  Wednesday 27 July 2011 - 08:00

Figure 7.20: Setting a new alarm.

It then appears in a table, along with a link that allows to modify it :

**Alarms** :

Date	Object	Comment	
27/7/2011 08:00	Alarm	Buy new toners !	<a href="#">Modify</a>

### 7.3.2 Modifying an alarm, turning it off

As shown on Fig.7.21, an alarm can be modified text- or date- wise ; it can also be turned off through the eponymous button, making it disappear from the alarm table.



Figure 7.21: Managing an alarm.

### 7.3.3 The Alarm Event Control

Provided that the Alarms event control (1.3) has been enabled, as featured on Fig.7.22, alarms will appear on the alarm's due date (in this example, on July 27), at the [Home](#) page, in the following way :

- before the alarm's due *time* (in the example 8:00 AM), it will appear normally (as a click-link to the page where this alarm can be modified/turned off) ;
- after the alarm's due time, it will blink, so as to emphasize it.



Figure 7.22: Alarms appear here on their due date.

The [Modify](#) on this box leads to the table of alarms.

### 7.3.4 Alarms for other objects

In the Agenda, as seen during appointment creation (7.2.3.1) or modification (7.2.3.2), an 'Alarm :' menu is used to **automatically** create an alarm reminding that appointment a *before* its due date and time.

For instance, if an appointment is set on July, 28 at 3 PM and has been set with a '1 day before' alarm, this alarm will appear on the alarm box on on July, 27 ; after 3PM on that day, it will be blinking. The following will be displayed :



Following that link will lead directly to the page where this appointment can be modified ; the alarm can then be turned off by setting to 'None' the 'Alarm' menu.

## 7.4 File manager



*File manager access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

*[Menu script user rights :] File manager*

Blue Chameleon includes a File managing system that allows to manage folders and files in order to share them between all users, no matter how distant.

The *File Manager Page* is accessed via **File manager**. As featured on Fig.7.23, it shows a two-panel view, with on the left the list of folders and on the right the current directory as well as the list of files and/or folders underneath it.

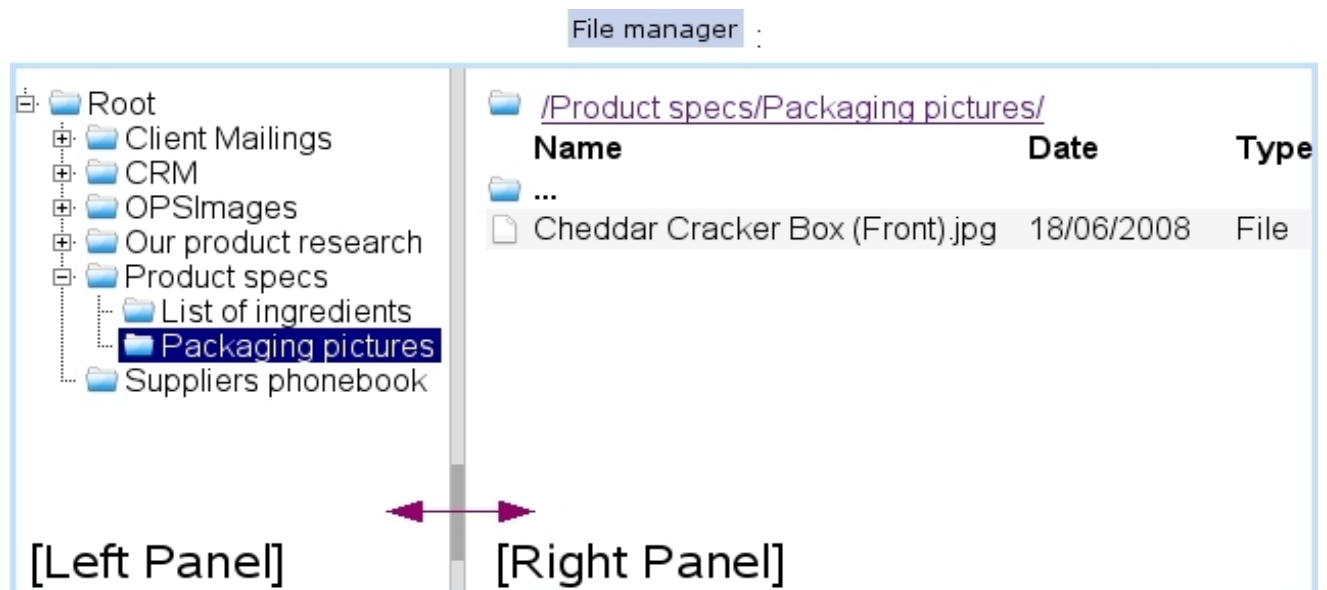





Figure 7.23: The *File Manager Page*.

Folders on the left panel can be expanded/reduced by clicking the / icons. There, a double click on the folder's name also serves as to expand/reduce it ; any click (whether single or double) displays the folder's contents on the right panel.

On the right panel, the contents of folders are accessed via a double click ; as for the  ... icon, it serves as, via a double-click, to display the contents of the parent directory.

## 7.4.1 Basic File Manager use

Blue Chameleon's file manager is straightforward to use, as described in the following.

### 7.4.1.1 Folder and file managing

As shown in Fig.7.24, to create a new folder in the current directory do a right-click on the right panel of the *File Manager Page* and then click on **Add folder**. Subsequent pop-up shows the current directory and this new folder's name is filled in.

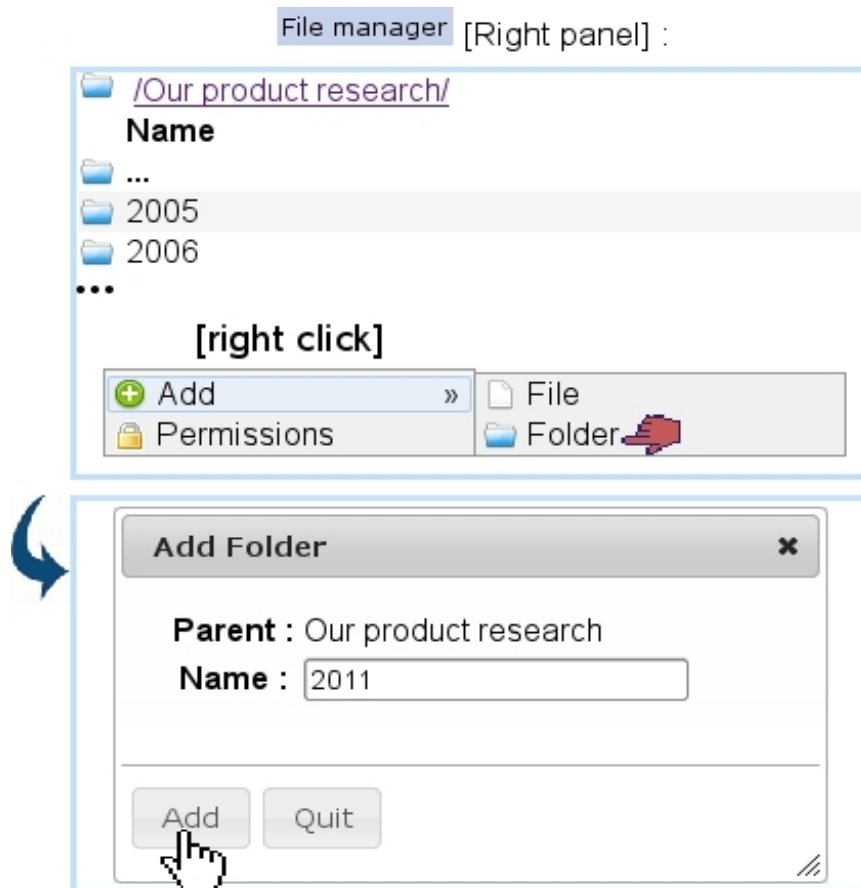
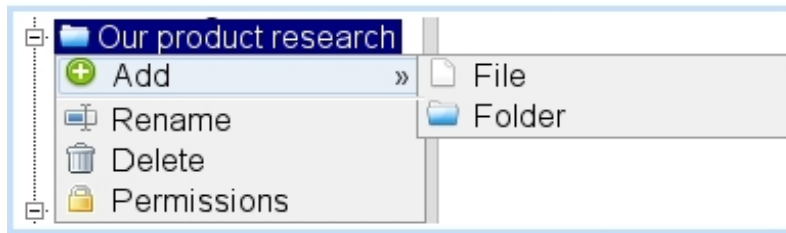


Figure 7.24: Creating the new folder '2011' at the 'Our product research' directory.

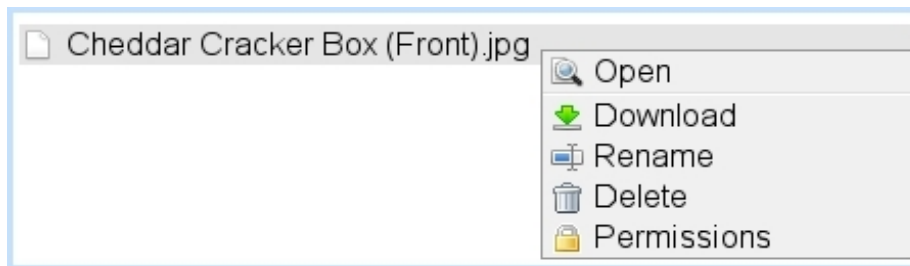
This folder could also be have been created from the left panel by a single click to highlight folder 'Our product research' and by then a right click :

File manager [Left panel] :



Files are uploaded in a similar way through **Add file**, except that pop-up window has a **Browse...** button to find the aimed file in your computer.

Folders and files can then be practically managed (renamed, downloaded in the case of files, deleted) by positioning mouse cursor over the object and doing a right-click, which thus shows the following choices :



The appearance of those various options depends on which default rights or user group rights have been assessed to this folder/file.

## 7.4.2 File and folder rights

General rights regarding files and folders are set individually for them, through **Permissions**, as accessed via a right-click on the object.

On the pop-up as featured as an example in Fig.7.25, the following is featured :

- general information on the object such as creation/last modification dates, creating user... ;
- a series of rights menus.

Those rights aim to specify for each user group if its members have the right to read, create, delete, modify this file or folder. When a menu is left as 'Unspecified (see Others)', the right as defined further down as 'Default right:' then applies.

When a file or folder is created, by default all of the menus are set as 'Unspecified' and the 'Default right:' is set to Delete/Create/Modify, which means that, unless permissions are updated, any user from any group can perform these actions on the object.

If object is a folder, the 'Apply to sub-objects' check-box can be ticked so that the rights are also applied to the objects under this folder.

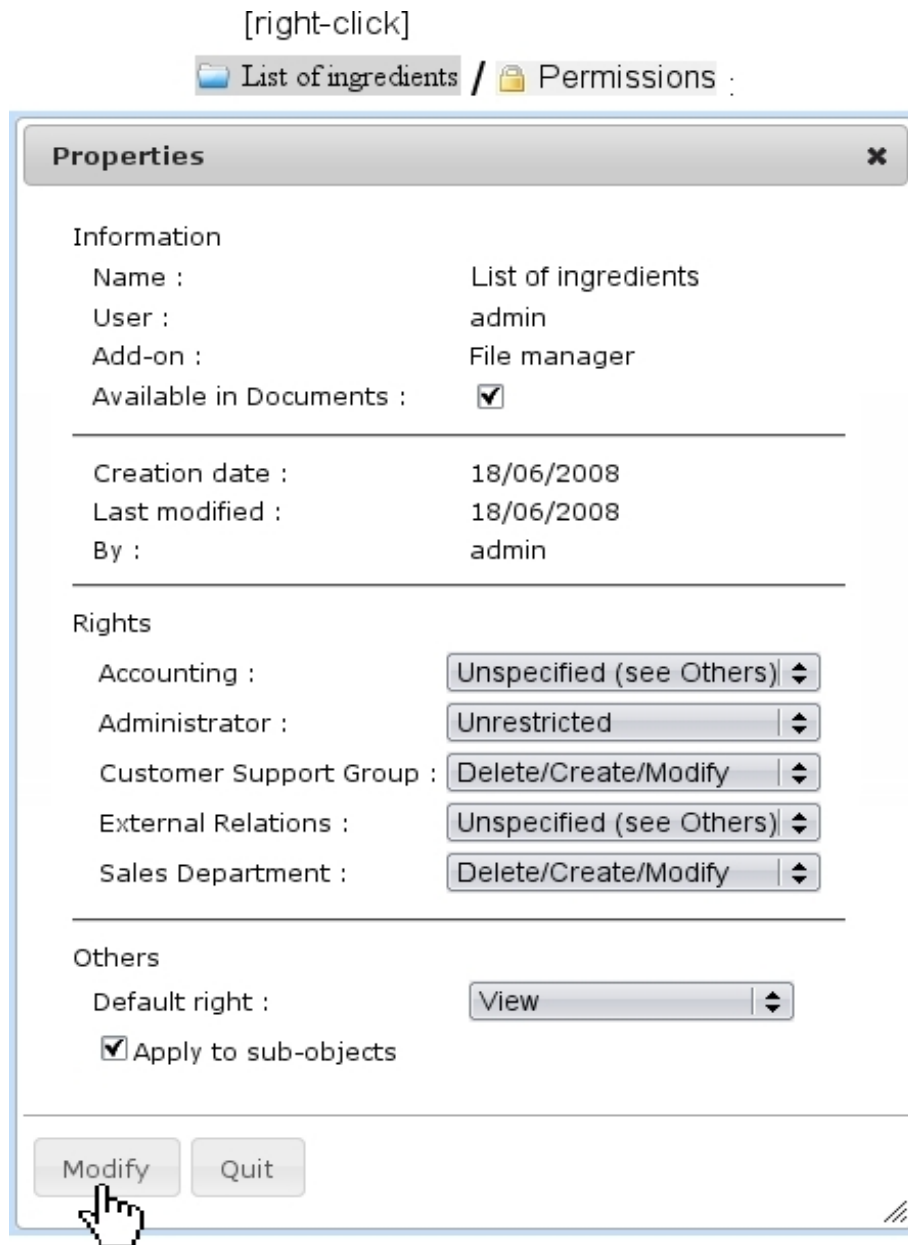


Figure 7.25: Setting the rights for the folder 'List of ingredients'.

## 7.5 Lists of Tasks

During the life of a company, some deeds have to be performed on a regular basis, such as the checking of office supplies reserves, the maintenance of appliances like printers, the cleaning of sensitive equipment...

To keep track of what has been done and by whom, Blue Chameleon provides an interface where :

- different 'task models' (e.g., 'Printer maintenance') are defined ;
- to each of those, task types (e.g. 'Change/recycle empty toners', 'Order paper',...)

are attached ;

- this framework allows, on a predefined periodical basis, to manage tasks, all the while keeping trace of what has been done.

### 7.5.1 Rights for Lists of Tasks

They are ruled at the *Modify User Page* (Fig.9.17) for instance as illustrated in Fig.7.26.



Figure 7.26: The user rights that rule Lists of Tasks.

For this user :

[*Menu script user rights* :]

- Task List : rules the access to the List of Tasks add-on

[*Task List user rights* :]

- Model management : rules the prerogatives (view, create, modify, delete) that user has on task list models (7.5.2), in general ; rights for *individual* models are set elsewhere (7.5.2.2) ;
- List management : rules the prerogatives (view, create, modify, delete) that user has on task lists (7.5.3).

All commands in this sections are accessed via **Add-ons** / **Task List**.

### 7.5.2 Task list models and task types

Fig.7.27 features the creation of a task list model called 'Water fountains' ; there, the following is set :

- a name for this model ;

- a periodicity (daily, weekly, monthly, quarterly, biannual or annual) ;
- a start date.

Add-ons / Task List / Models :

**Task list, Models, Add**

Model name :

Period :

Start date : 12/9/2011

**Task list, Models**

Model	Period	Start date	End date	Status	Tasks	
Water fountains	Weekly	12/09/2011	12/09/2011	Inactive	0	<input type="button" value="Modify"/> <input type="button" value="Delete"/>

Figure 7.27: Creating a new task list model.

After creation, model is featured in a table where the aforementioned data is featured, with also an end date, a status (inactive yet), a number of attached tasks (none exists yet), and eponymous buttons to modify or delete it, providing that the user rights for 'Model management' are sufficient (7.5.1).

### 7.5.2.1 Modifying a task list model

As shown on Fig.7.28, modifying a task list model provides more options than during its creation :

- setting its status : active/inactive (for a task list model to be opened (7.5.3.1) in the future, it must be set to 'Active') ;
- setting an end date ;
- adding a comment to generally describe the task list model ;
- setting the  as explained further down ;
- ing tasks to it.

It is to note that once a task list is opened (7.5.3.1), periodicity and start date cannot be modified anymore.



Task List / Models / Water fountains Modify :

**Task list, Models, 'Water fountains', Modify**

Model : Water fountains

Period : Weekly

Status : Active

Start date : 12/9/2011

End date : 31/12/2011

Comment : Everything related to maintenance, fill... of water dispensers

Update Access rights

---

No task

Add

Figure 7.28: The *Task List Model Modify Page*.

### 7.5.2.2 Access rights of a task list model

These rights, as illustrated at Fig.7.29, rule, usergroup-wise, whether users can view or modify task list models, or none of those (in which case it will be hidden from the user).

[Task List Model Modify Page] Access rights :

**Task list, Models, 'Water fountains', Update, Access rights**

**Accounting** : View

**Administrator** : Modify

Customer Support Group : View

External Relations : View

Sales Department : View

---

Update return to models

Figure 7.29: Usergroup-related access rights for task list model 'Water fountains'.

The usergroup(s) current user belongs to are displayed in bold font.



*It is to note that the 'Unrestricted' value as set for 'Model management' (7.5.1) allows to access any model regardless of its usergroup access rights. This can be useful to still access (or modify) a model if, by mistake, all its usergroup rights had been set to 'None' (or 'View').*

### 7.5.2.3 Adding task types to task list models

As seen on the *Task List Model Modify Page* (Fig.7.28), a button allows to add task types to a task list model.

Apart from a name, as Fig.7.30 shows, a task type is assessed a default user, a status (setting it immediately to active is advised) and a comment.

[Task List Model Modify Page]  :

**Task list, Models, 'Water fountains', Add**

Task name :

Default user :  ▾

Status :  ▾

Comment :




Figure 7.30: Adding a task type for task list model 'Water fountains'.

Of course, more task types can be added by the same process. As a result, *Task List Model Modify Page* feature those task types, which can be individually modified and deleted :

[Task List Model Modify Page] :

Task	User	Status	Comment		
Gen. cleaning	Jack Jones	Active	Disinfect taps, scrub gaskets	<input type="button" value="Modify"/>	<input type="button" value="Delete"/>
Bottle mgmt	Jack Jones	Active	Replace, reorder, recycle	<input type="button" value="Modify"/>	<input type="button" value="Delete"/>
<input type="button" value="Add"/>					

### 7.5.3 The use of task lists

Now that the creation of task list models and their task types has been shown, it is time to see how they are put in gear.

### 7.5.3.1 Opening a task list

On the page as accessed via **Add-ons** / **Task List**, a **Open list** button is featured ; clicking on it leads to a page where task list models as previously defined are featured.

Fig.7.31 shows this page ; it can be seen that each task list model has a checkbox, which is only enabled if **task list model is set to active** ; to do so, go to the *Task List Model Modify Page* (7.5.2.1) and set status to 'Active'.

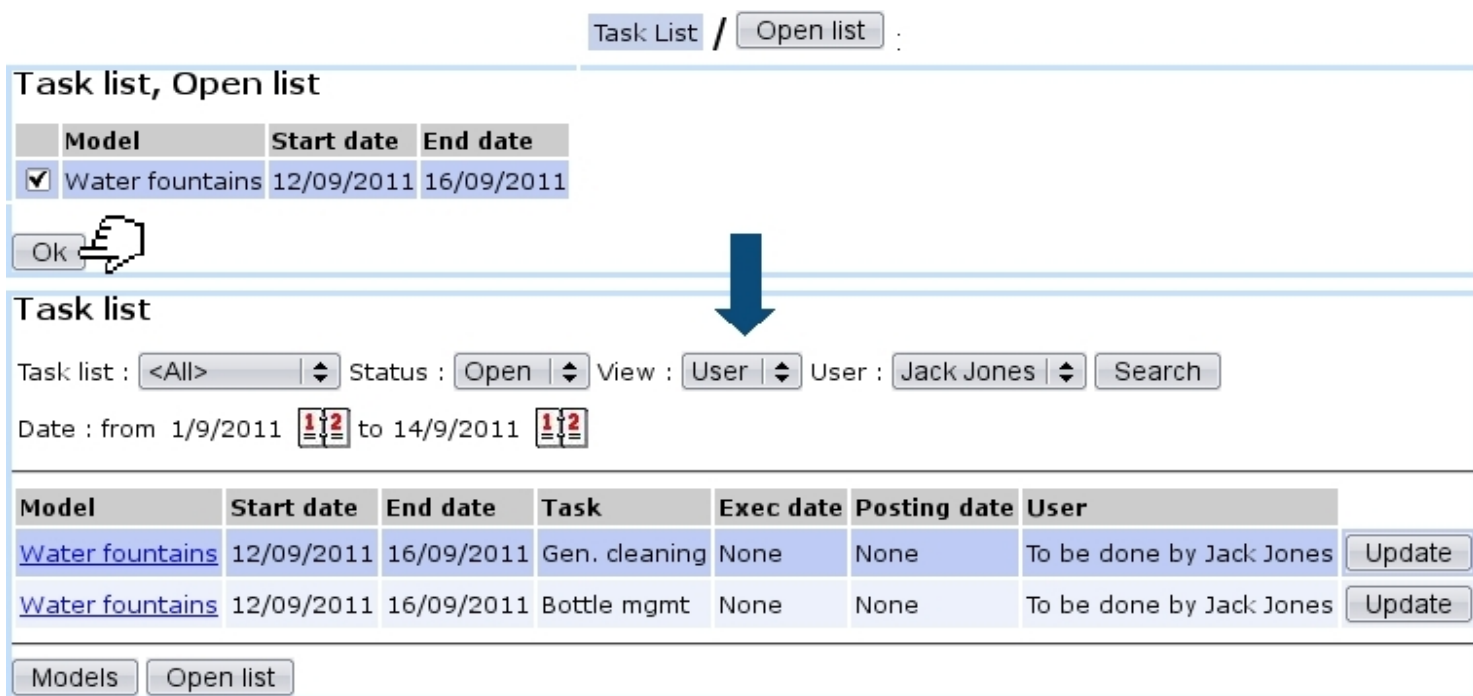


Figure 7.31: Opening task list 'Water fountains'.

The 'Date end' as featured on the first screen corresponds to the periodicity (here, weekly). Upon click on **Ok**, the main page of the add-on is shown again, now featuring :

- for the opened task list, the tasks to be done (corresponding to the task types that had been defined, 7.5.2.3), with start and end dates corresponding to the periodicity ;
- execution and posting dates, not existing yet if task has not been done ;
- the user who is supposed to accomplish this task (as defined by the default user in Fig.7.30) ;
- an **Update** button for each task.

Tasks are displayed in red if their due date is inferior or equal to the current date.



*If a task list has not been opened before the first day it is supposed to start (depending on the periodicity), it is opened automatically.*

### 7.5.3.2 Searching for task lists

As shown in Fig.7.31, this add-on's main page features several menus to perform task list searches :

- by task list name ;
- by status :
  - Closed, which is the state of a task list which all tasks have been accomplished (7.5.3.4) ;
  - Open, which is the state of a task list which has still unaccomplished tasks ;
  - All task lists, whether open or closed.
- viewing by user (which is what is shown on Fig.7.31) or by task, which offers another view detailed further down.
- by user.

Also, two calendars allow to narrow the display of task lists in the span of specific dates.

### 7.5.3.3 The 'View : Tasks' display

Setting the 'View:' menu to 'Tasks' displays what is featured on Fig.7.32 ; there, in contrast to the 'User' view (Fig.7.31) :

- the view is more synthetic as a single line is dedicated to a task list ;
- the number of accomplished tasks for this task list and the total number of tasks are featured (e.g. 0 tasks done on the 2) ;
- a  button leads to a page detailed at 7.5.4 where the details of tasks are shown and can be printed out as a PDF ;
- a  button leads to a page where tasks are displayed in a table very similar to the 'User' view ;
- a  button allows to declare tasks as accomplished.

It is to note that in this display, the 'User' menu is without effect.

Task List :

**Task list**

Task list : <All> Status : Open View : **Tasks** User : Jack Jones Search

Date : from 1/9/2011 to 14/9/2011

Model	Start date	End date	Status	Tasks			
<a href="#">Water fountains</a>	12/09/2011	16/09/2011	Open	0/2	View	Modify	Record

Figure 7.32: The 'Tasks' view.

### 7.5.3.4 Recording tasks

Declaring the task(s) of a task list as done is most easily achieved through the **Record** button as available in the 'View : Tasks' display (see above).

As illustrated on Fig.7.33, a task that was done is ticked, its execution date is chosen and a comment is added. Of course, should the tasks of a task list be not accomplished on the same day, this screen can be accessed anytime.

Task List / [View : Tasks] :

Model	Start date	End date	Status	Tasks			
<a href="#">Water fountains</a>	12/09/2011	16/09/2011	Open	0/2	View	Modify	Record

**Task list, 'Water fountains', Record**

From 12/09/2011 to 16/09/2011

	Task	Execution date	Comment
<input checked="" type="checkbox"/>	Bottle mgmt	16/9/2011	Evthg. was cleansed thoroughly
<input checked="" type="checkbox"/>	Gen. cleaning	16/9/2011	New batch of 50 gal. bottles ordered

Ok

Model	Start date	End date	Status	Tasks		
<a href="#">Water fountains</a>	12/09/2011	16/09/2011	Closed	2/2	View	Modify

Figure 7.33: Declaring these tasks as done.

When all tasks belonging to a task list are done, this task list is closed ; the task list name click-link (e.g. [Water fountains](#)) then leads to a similar 'record' screen except

any action is now disabled.

This way of recording achieved tasks is the simplest. It also sets the 'To be done by' user as the default user for this task ; should a modification be done in execution date or user, a more detailed screen is available as explained next.

**7.5.3.4.1 Updating tasks** As it can be seen on the 'User' view (Fig.7.31), each task of a task list has an **Update** button, leading to a screen as illustrated at Fig.7.34.

There, execution date (but *not* posting date), user in charge/user who did it and comment can be updated.

This screen can also be used to declare an undone task as done.

Task List / [View : User] :

Models	Task	Exec date	Posting date	User	
<a href="#">Water fountains</a> ...	Gen. cleaning	16/09/2011	16/09/2011	Jack Jones	<b>Update</b>

**Task list, 'Water fountains', 'Gen. cleaning', Update**  
From 12/09/2011 to 16/09/2011

Exec date : 16/9/2011  Posting date : 16/09/2011

User :  To be done by :

Comment :

**Modify**

Figure 7.34: Options by which updating a task.



*The advantage of this screen in contrast to the 'Record' one as presented above is when task is done by an other user than the one who was supposed to do it. This screen also allows to "undo" a task (7.5.5.1).*

## 7.5.4 Printing out task lists

When a 'View : Tasks' display is on, clicking on the **View** button leads to the page illustrated at Fig.7.35, where tasks are listed along their execution and posting dates, the

user who did them and their comment.

A **Print** button then allows to generate a PDF file summing up this data.

Task List / [View : Tasks] :

Model	Start date	End date	Status	Tasks
<a href="#">Water fountains</a>	12/09/2011	16/09/2011	Closed	2/2 <b>View</b> <b>Modify</b>

**Task list, 'Water fountains', View**  
**From 12/09/2011 to 16/09/2011**

Task	Execution date	Posting date	User	Comment
Bottle mgmt	16/09/2011	16/09/2011	Jack Jones	New batch of 50 gal. bottles ordered
Gen. cleaning	16/09/2011	16/09/2011	Jack Jones	Evthg. was cleansed thoroughly

**Print**

[Result on generated PDF] :

Water fountains from 12/09/2011 to 16/09/2011

Task	To be done by	Done by	Posting date	Execution date	Comment
Bottle mgmt	Jack Jones	Jack Jones	16/09/2011	16/09/2011	New batch of 50 gal. bottles ordered
Gen. cleaning	Jack Jones	Jack Jones	16/09/2011	16/09/2011	Evthg. was cleansed thoroughly

Figure 7.35: Printout of a closed task list.

### 7.5.5 Management of Task lists through time

Task lists are periodical, which means they are to be cyclically recommenced. This is done exactly as described in 7.5.3.1, except that now, the start and end dates have been updated according to the periodicity of the task list, here corresponding to the next week :

Task List / **Open list** :

**Task list, Open list**

	Model	Start date	End date
<input checked="" type="checkbox"/>	Water fountains	19/09/2011	23/09/2011

**Ok**

Previously-achieved task lists remain of course available to be consulted anytime by making searches with 'Closed', 'Tasks' for the status and view menus.

### 7.5.5.1 Re-opening a task

It may happen that, though a task has been declared as done, it must be opened again for whichever reason.

This can be done as featured on Fig.7.36 by making a search with 'Closed', 'User' for the status and view menus ; the **Update** button will still be available to access the screen to update this task : there, setting the 'User' menu to '**Unspecified**' will re-open this task.

Task List :

**Task list**

Task list : <All> Status : Closed View : User User : <All> Search

Date : from 1/9/2011 to 30/9/2011

Model	Task	Exec date	Posting date	User	
Water fountains	Gen. cleaning	23/09/2011	23/09/2011	Robert Zmuda	Update

**Task list, 'Water fountains', 'Gen. cleaning', Update**

From 19/09/2011 to 23/09/2011

Exec date : 16/9/2011 Posting date : 23/09/2011

User : <Unspecified> To be done by : Jack Jones

Comment : <None>  
 Tony Clifton  
 Thomas Hanson  
 Jack Jones  
 Jane Kovács

Modify

**Task list**

Task list : <All> Status : Open View : User User : <All> Search

Date : from 1/9/2011 to 30/9/2011

Model	Task	Exec date	Posting date	User	
Water fountains	Gen. cleaning	None	23/09/2011	To be done by Jack Jones	Update

Figure 7.36: A done task that, upon inspection, did not fulfill the review, is opened again. Execution date is back to 'none'.

It is to note that the 'None' option as seen in Fig.7.36 still flags the task as done, but without mentioning any user in particular.



## 7.6 Object properties

Things handled during the use of Blue Chameleon (articles, clients, documents...) are most generally called objects.

While we always strive to provide the most exhaustive forms to define or modify them, some particular properties that you might want to define to qualify an object with may be missing.

That is why we developed a dedicated add-on aimed at defining your own properties for your clients, articles... And manage them in an easy way.

### 7.6.1 Rights for Properties

They are ruled at the *Modify User Page* (Fig.9.17) for instance as illustrated in Fig.7.37.



Figure 7.37: The user rights that rule Properties.

For this user :

[*Menu script user rights* :]

- Properties : rules the access to the Properties add-on

[*Properties user rights* :]

- Defining properties : rules the prerogatives (view, create, modify, delete) that user has on properties (7.6.2) ;
- Using properties : rules the prerogatives (assessing, modifying, removing) that user has on an object's property/ies (7.6.3).

All commands in this sections are accessed via **Add-ons** / **Properties**.

## 7.6.2 Creating properties and managing them

Fig.7.38 features as an example how a new property "ID Registered" is added for clients ; there, the following is defined :

- a name for this property ;
- its type : User or System ;
- the object type (the list of available objects to set properties for is featured at 7.6.4) ;
- the type of data this property will be, amongst the following choices :
  - Yes/No : a simple menu with these choices ;
  - Boolean : a simple menu with True/False ;
  - Boolean extended : a simple menu with True/False/Null ;
  - Integer ;
  - a Date or a Time (7.6.2.1.1) ;
  - Listbox : a menu which items are added by user ;
  - Ref. object : another object (an extensive example is featured at 7.6.3.2).



The screenshot shows a dialog box titled "Property, Add" with a breadcrumb path "Add-ons / Properties / Add". The dialog contains the following fields:

- Property name: ID registered
- Type: User
- Object type: ossbo - Clients
- Data type: Yes/No

An "Add" button is located at the bottom left, with a hand cursor icon pointing to it.

Figure 7.38: Creating a new property aimed at clients, consisting in Yes or No choices.

After their creation, properties can be looked for add-on's main screen :

**Add-ons** / **Properties** :

**Search property**

Property name:  Type: <All> Search

Object type: ossbo - Clients Status: <All> Modify

Add

Property	Type	Object type	Data type	Default value	System	View	Modify
<a href="#">ID registered</a>	User	ossbo - Clients	Yes/No	No	<None>	<span>View</span>	<span>Modify</span>

A table sums up properties' types and object types as well as providing a Modify button, allowing as described next to configure properties more extensively.

### 7.6.2.1 Modifying properties

As featured on Fig.7.39, modifying a property offers a far greater choice of configuring options.

There :

- General information such as property name and comment can be modified/added. Also, the default value of the property when it will be set for an object (7.6.3) as a 'System' value. It is to note that property type, related object type and data type cannot be modified anymore.
- the style of the property is set :
  - the status of the property (**setting it to 'Active' is necessary for it to be used**) ;
  - whether this property will be shown in the object's summary, if it has one (7.6.4) ; this item is better set to yes, then ;
  - whether multiple occurrences of that property are allowed for one object ;
  - if the 4-eyes principle is applied : an update in property's value can only be achieved if current user is different from the last user to have done a modification ;
  - In the context of the object it is set for :
    - \* whether the property can be added on creation ;
    - \* whether the it can be updated ;
    - \* whether it can be deleted.
  - the minimum level required to update a property, comparing with user's privacy access level (11.1.1.2) ;
- How property label and its values (here, Yes and No) will appear on the screen : normally, with the 'Warning' style (i.e., in red) or in bold font.

[Search Properties] **ID Registered**  :

**Property, 'ID registered', Update**

Property :

Type : User

Object type : Clients

Data type : Yes/No

System :

Default value :

Comment :

**Style :**

Status :

Show in summary :

Multiple :

4-eyes principle :

Add on create :

Add :

Delete :

Update :

Access level :

**View :**

Label :

No :

Yes :





Figure 7.39: Modifying property 'ID registered'.

**7.6.2.1.1 Date, Time properties** These properties, when they are updated or set for an object, feature a calendar icon  that allows to choose a date ; also time in the case of the eponymous property.

**7.6.2.1.2 'Ref. object' properties** Properties of that kind offer more configuring possibilities, as featured on Fig.7.40. As a 'Ref. object' property consists in associating another object with the object this property applies to, the type of the associated object

has to be chosen.

This choice is done through the 'Associated object type', where a particular object type the property will be (in this example, a document) can be set, along with an (optional) default value. When the property will be set for an object, for instance as shown in 7.6.3.2, this particular object type will be imposed.

[Search Properties] **Entry contract**  :

**Property, 'Entry contract', Update**

Property :

Type : User

Object type : Clients

Data type : Ref. Object

System :

Associated object type :

Default value : None

Comment :

...

Figure 7.40: This property applying to clients will only accepts documents for its value.

This imposed associated object type can be removed by setting the menu to 'All'.

### 7.6.3 Setting properties

In the current example, a property as applied to clients was created.

Such properties will appear on the *Client Management Page* (2.3), where they are still not set :

**Client management**

<b>Username:</b>	Smith.John	<b>Subscription status:</b>	activated
<b>Title:</b>	Mr	<b>Active subscriptions:</b>	1
<b>Name:</b>	Smith	<div style="border: 1px solid black; padding: 5px;"><p>There is no property</p><p><a href="#">More...</a></p></div>	
<b>First name:</b>	John		
<b>Address:</b>	12 Orange Road 90000 Los Angeles		

...

Then, clicking on the [More...](#) link leads to a process featured on Fig.7.41 where :

- a screen saying that this object has no property (yet) allows to  one ;
- then, a menu enables to choose a client-related property (here, our 'ID registered') featured along with its default value (7.6.2.1), which is set to whichever is needed ;
- a final screen sums up the set property and provides a button to go back to the *Client Management Page*, where the property and its value are now appearing.

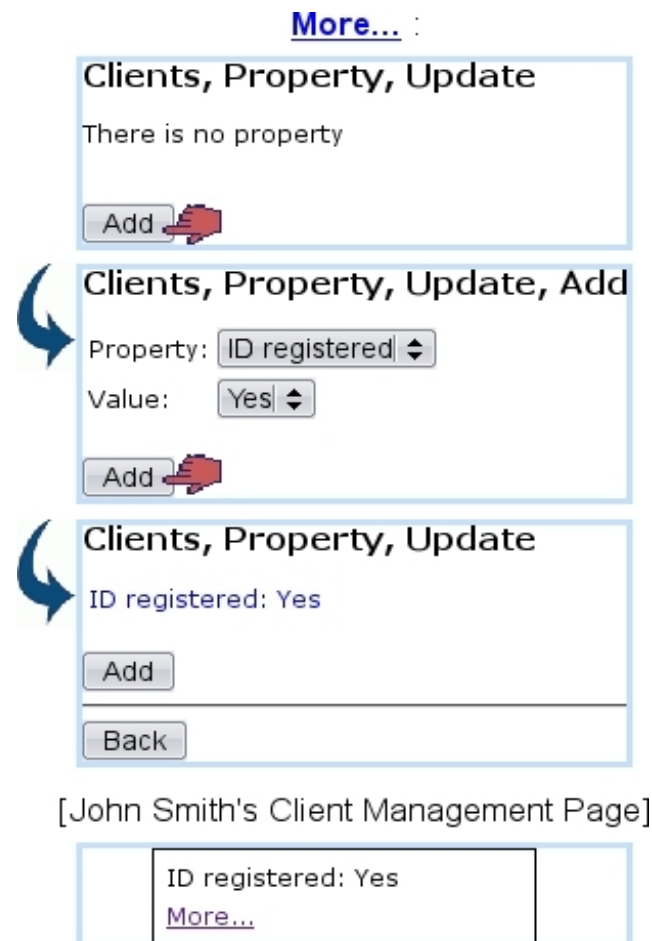


Figure 7.41: Setting the property 'ID registered' to 'Yes' for client John Smith.

### 7.6.3.1 Updating, removing a property

Afterwards, if needed, this client property can be updated via the [More...](#) link, as shown in Fig.7.42.

*This can only be done by the same user if property's 4-eyes principle (7.6.2.1) was set to No.*

It can be seen that a  is available for property to be removed.

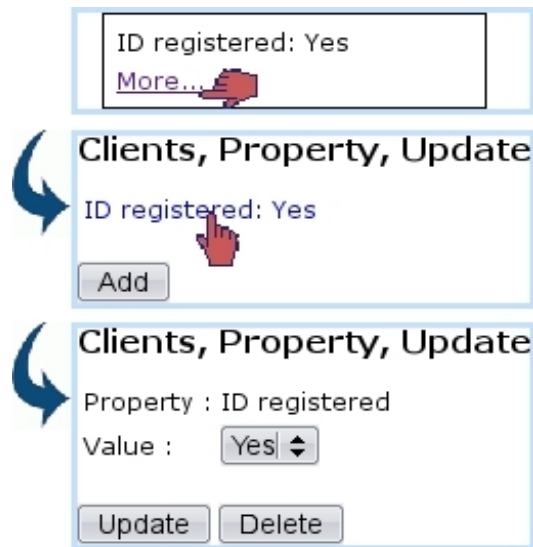


Figure 7.42: This allows a property to be changed or removed.

The updating and deleting a property are only available if property's style (7.6.2.1) allows so.

### 7.6.3.2 Adding other properties

Other properties - if they exist for the current object type - can also be added through the eponymous button.

For instance, a Ref. object property called 'Entry contract' has been defined for clients ; Fig.7.43 then shows how this property is set to a particular document object (as uploaded through the File Manager, 7.4) for a client.

It is to note that, in this example, the choosing of a document is imposed (in contrast to any other object type) because the 'Associated object type' field for 'Entry contract' property (7.6.2.1.2) was set to 'documents'.

As a result, on the *Client Management Page* for this client, this new property will appear (Fig.7.44).

## 7.6.4 List of objects to set properties for

So far in Blue Chameleon, a "Property" frame can be seen in the following contexts :

- 2.3 *Client Management Page*

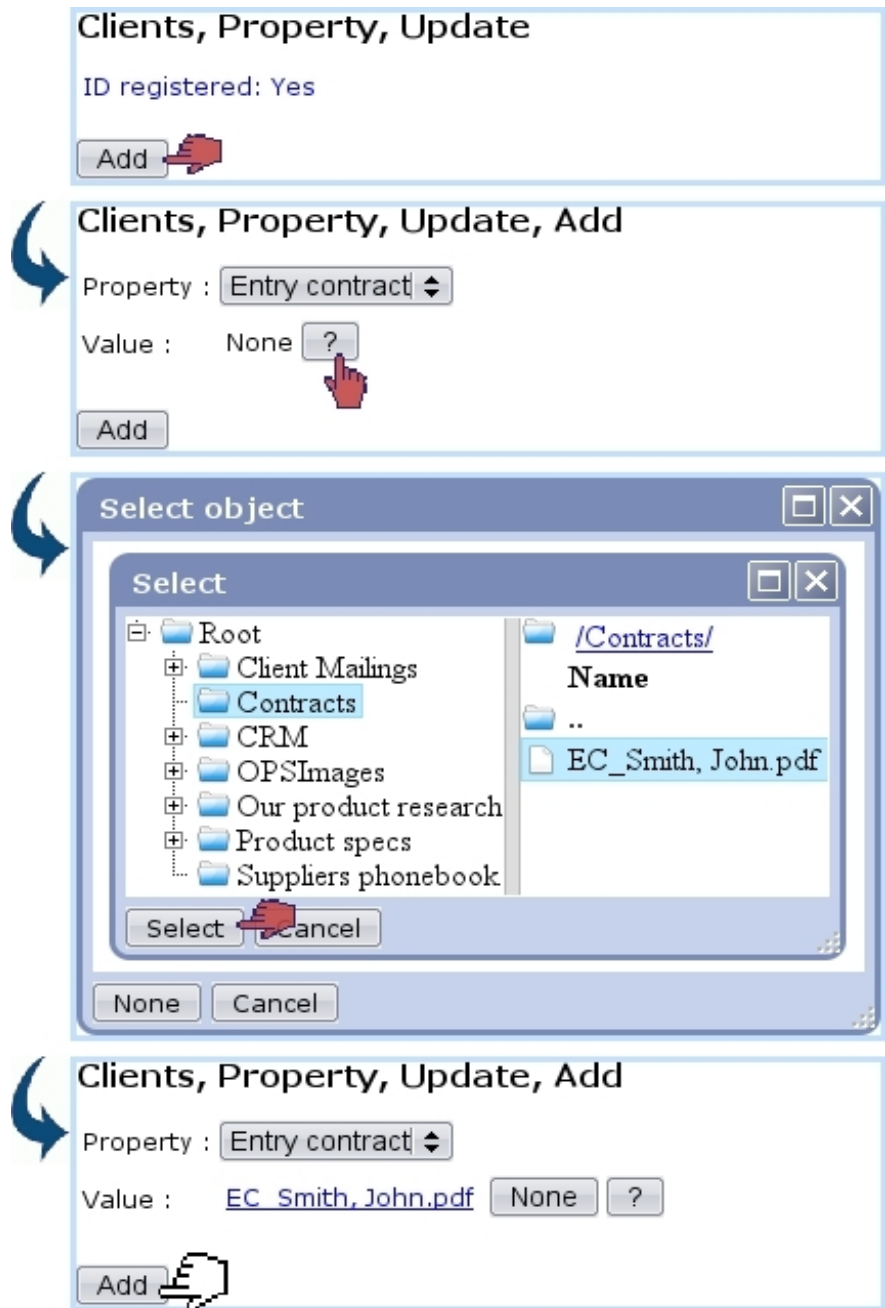


Figure 7.43: Adding an other property for a client.

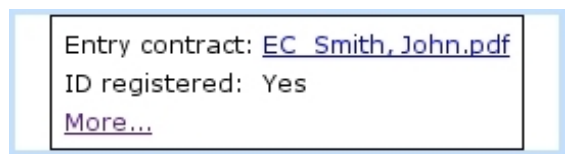


Figure 7.44: The two previously-set properties are now featured.




## 7.7 Paperwork management

A company's everyday life often entails the reception and sending of paper documents, sometimes in such volumes that it becomes difficult to keep track of what has been received/sent and when, also what shall be sent.

In order to make this easier, this Blue Chameleon addon allows to keep trace of any communication-related event and permits actions such as :

- upload documents from the computer and associate them with a client ;
- attach documents to other documents, such as sent replies ;
- optionally create tickets associated with documents, in order to give them a "to-do" feature.

All the commands in this add-on are accessed via .




*Paperwork management access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

*[Menu script user rights :] Mail*

### 7.7.1 The *Mail Management Page*

As illustrated at Fig.7.45, the main page of this add-on allows to add and search for mail documents ; it features the following :

- a  which leads to a client search ;
- a menu allowing to choose a specific mail document type (7.7.7) ;
- a 'state' menu enabling to choose only sent or received documents, or any of those ;
- 'treated' and 'archived' menus allow to search specifically for documents flagged as such (7.7.6), or not, or any ;
- the ordering of search results by creation, or modification dates, or by access level (7.7.2) ;
- a 'Show attached' menu allowing to show only documents that are attached to no other ('no'), optionally featuring their attached documents in the table ('as parent'), or any kind of document regardless of attachments ('as document') ;
- two calendar icons permitting to restrict search results in between (as 'Date:') two creation or modification dates ;

- a  allowing to upload and create a new mail document entry (7.7.3).

Add-ons / Mail :

**Documents**

Clients :  ? - type :  state :

treated :  archived :  ordered by :

Show attached :  Date :

from  Monday 02 May 2011 to  Friday 06 May 2011

Object name	Documents	Date	Access	Type	Modification	
...						...

Figure 7.45: The *Mail Management Page*.

Search results are summed in a table that features client and mail document names, reception, creation and last modification dates, access level of the mail document, type (7.7.7) and, as seen on Fig.7.47, three buttons that allow to view/act on the mail document in various ways (7.7.3.1, 7.7.3.2, 7.7.3.3).

## 7.7.2 Access levels

As some mail documents might be confidential or irrelevant for some users to see, mail documents are assessed an access level from 0 to 5, comparing with user's privacy level (11.1.1.2) as set on the Modify User Page (Fig.9.17).

So, for instance, if a mail document has been assessed an access level of 3, only users with a privacy level of 3 or above will be able to open it and attach mail documents to it ; nonetheless, it will still appear only nominally in the mail document table.

## 7.7.3 Creating a mail document

For instance, when a mail document is physically received, it is scanned as a PDF ; it is then uploaded into Blue Chameleon's Mail Manager in the way featured at Fig.7.46.

The simple process is as follows : on the *Mail Management Page*, the  is clicked, leading to a client search, that ultimately makes the makes her/him featured in the eponymous field ; the same button is clicked again, leading to a page where :

- client general information is summed up ;

- the document to be uploaded via  is given a name ;
- its type (7.7.7) as well as its state ('received') are chosen ;
- the creation of a ticket (7.7.3.2) is recorded (if type allows/forces it), and this ticket can be already forwarded to another person ;
- the reception date of the document can be set (it is set by default to the current day) ;
- an access level is chosen (7.7.2).

[Mail M. Page]  / [Client Search] /

Clients:  ...  :

**New document**

**[Client General Info]**

---

Document name :

Document :

Type :

Ticket :

Date :  -  -

Access level :

Comment :

Figure 7.46: "Entering" a newly-received and scanned document into Blue Chameleon.

Upon successful creation, the *Mail Management Page* will feature the document in its table, as illustrated on Fig.7.47.

There, **provided the user's privacy level is equal to or greater than the document's access level** : the name of the mail document is featured as a click-link that allows to download it and three buttons are accessible : for viewing it, viewing its ticket, or attach documents to it.

These actions are described next.

[Mail Management Page] :

Object name	Documents	Date	Access	Type	...
<a href="#">Tax Office</a>	<a href="#">Tax Form, 2011</a>	30/9/2011	4	Gen. Mailing - received	...

Type	Modification				
Gen. Mailing - received	30/9/2011 10:30	<input type="button" value="View"/>	<input type="button" value="View ticket"/>	<input type="button" value="New document"/>	

Figure 7.47: A document with all its main information.

### 7.7.3.1 Viewing/managing a mail document

Fig.7.48 shows the pop-up displayed by ing a document.

[Tax Form, 2011](#) ...  :

**View document**

Creation : **30/9/2011 10:30** by **admin**  
Modification : **30/9/2011 10:30**  
Object : **TaxOffice**   
Type : **Gen. Mailing - received**  
Document : [Tax Form, 2011](#)  
Date : **30/9/2011**  
Ticket : [227](#)  
Access level : 4    
Treated : no    
Archived : no

---

Figure 7.48: Details of a mail document.

There :

- the client (or object) associated with the document can be updated ;
- the mail document can be downloaded via the click-link ;
- a click-link leads to the view of the attached ticket (see 7.7.3.2), if mail document entailed the creation of one ;
- the access level of the mail document can be lowered or raised ;

- the mail document can be deemed treated and/or archived (7.7.6) ;
- a button allows to attach it to another document (7.7.4) ; this button can only be clicked if current document is not already attached ;
- if the document is attached to another document (and/or the other way around), it is featured (7.7.5).

### 7.7.3.2 Mail document tickets

If mail document creation included the creation of a ticket as it is the case in the current example, this ticket can be accessed either via the **View ticket** as found (if user's privacy right is sufficient) on the *Mail Management Page* or via the click-link as previously seen (e.g. [227](#)).

Either way, what is featured on Fig.7.49 will appear on the screen : a pop-up summing up which user group this ticket has been assessed to along with status and date, as a click-link to the *View Ticket Page* (8.3.3).

The uploaded document can also be downloaded here.

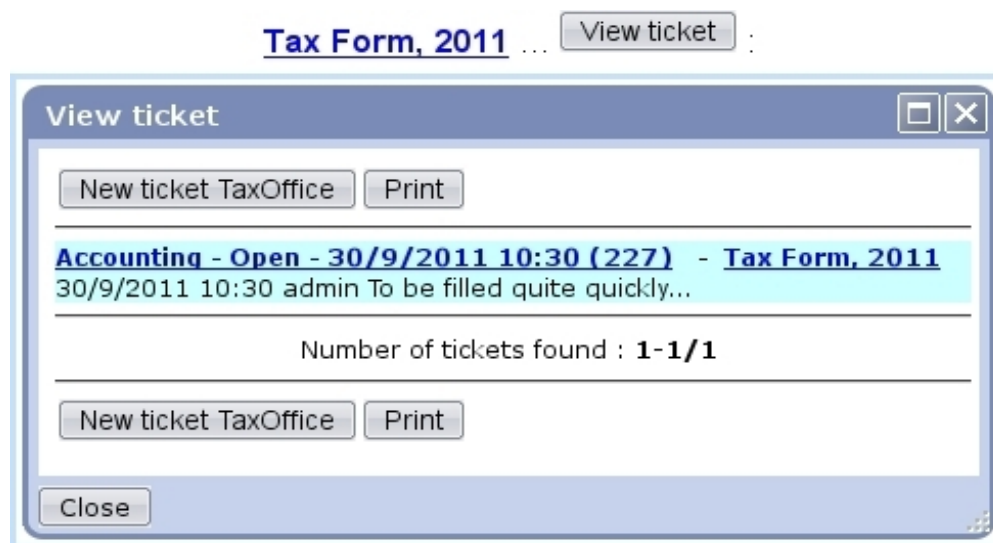


Figure 7.49: A short summary of the ticket created along the mail document ; from there, this associated ticket can be managed.

This way of doing, associating a ticket, endows the mail document with a feature of timely importantness.

### 7.7.3.3 Attaching mail documents

Still from the *Mail Management Page*, using the **New document...** button, a new document can be created as attached to this document.

An example of a "reply" is featured at Fig.7.50 ; the mail document for which to create an attachment is reminded and the correct status (here, 'sent') is selected.

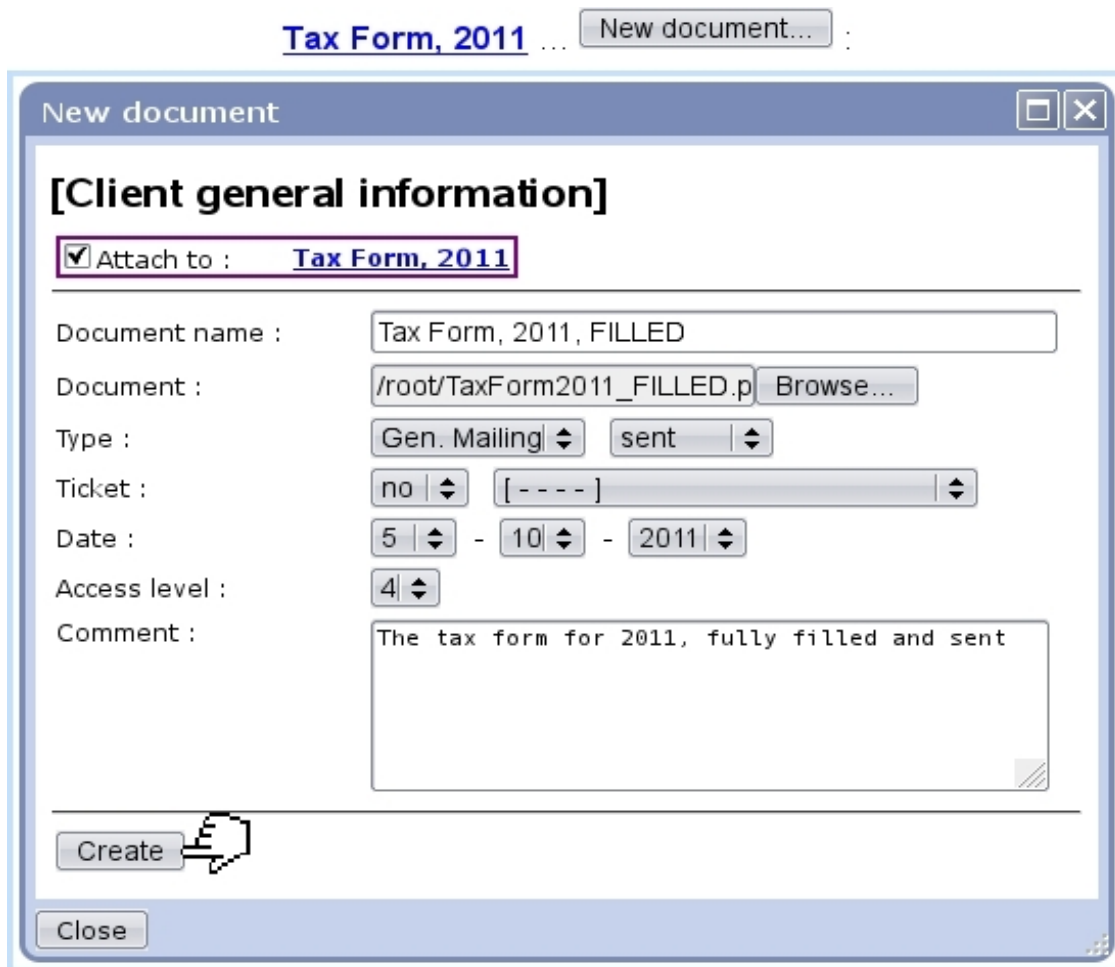


Figure 7.50: Attaching a reply to mail document 'Tax Form, 2011'.

This action can be done as many times as wanted, as a document can have several attachments.

#### 7.7.4 Attach current mail document to an other

This process is the reverse of the one previously described : now, from the *View Document Page* (Fig.7.48), using the **Attach to** button, current document is attached to an other.

Contrary to the previous process, this can be done once, as a document can be attached to one and only other document.

Fig.7.51 shows the simple process of attaching currently viewed mail document to an other.

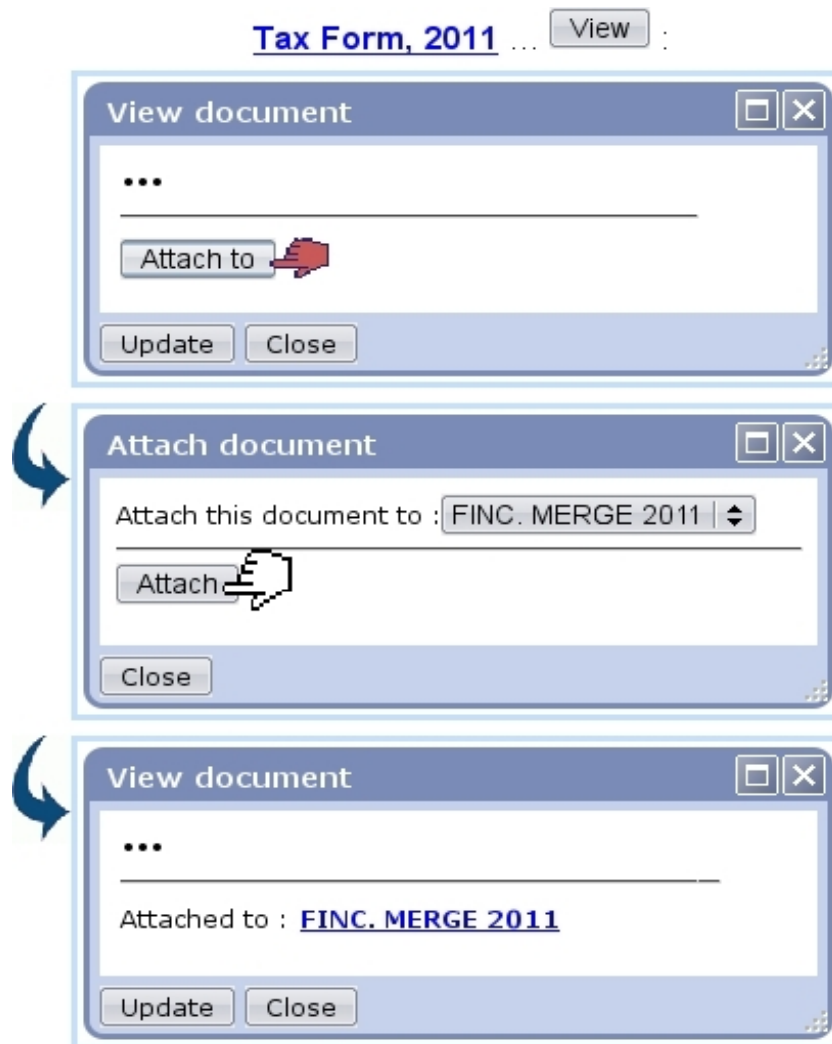


Figure 7.51: In this example, mail document 'Tax Form, 2011' is being attached to mail document 'FINC. MERGE 2011'.

### 7.7.5 Viewing attachments/attached document

In order to keep track of which document is attached to which, the *View Document Page* always features the parent document and the attached documents ; Fig.7.52 features both.

It can be seen that the *View Document Page* for [Tax Form, 2011](#) (that was first featured at Fig.7.48) now features an **Attachments** part with the attached document [Tax Form, 2011, FILLED](#) (as a click-link to be downloaded), as well as an 'Attached to' part resulting from what was done at 7.7.4.

Conversely, the *View Document Page* for [Tax Form, 2011, FILLED](#) features the mail document it is attached to.

This two-way of displaying information ensures that no ambiguity is left.



Figure 7.52: These are "linked" documents.

### 7.7.6 Flagging mail documents as treated and archived

In order to make the displaying and searching of mail documents easier, thanks to the 'Treated' and 'Archived' menus as seen on Fig.7.48, it is possible to :

- declare a document as treated, for instance when a reply has been added to it ;
- declare documents as archived, when the thread of received/replied-to documents is over, so that it does not clutter the display on the *Mail Management Page*.

Any change in those menus must be validated via the **Update** button at the bottom of the pop-up.



Treated and/or archived documents can be looked for specifically on the *Mail Management Page* thanks to the eponymous menus.

### **7.7.7 Mail document types**


[In Development]

## **7.8 Wall**

[In Development]

## 7.9 Customer Relationship Manager (CRM)

The Client interface as lengthfully explained in the Client Management Chapter is vital, but one particular need that could surface in a company is still left unsatisfied : the possibility to manage client needs and client prospection.

Therefore, Blue Chameleon has designed an Customer Relationship Management tool as accessible via the eponymous submenu element in the  command group.

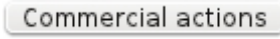
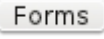
It mainly provides the following possibilities :

- relation-wise manage a potential client, known as a prospect (clients and prospects will be referred to in the following as 'contacts') ;
- send aimed campaigns (such as newsletters) to tactical contact lists ;
- send dedicated letters ;
- finely compose the documents related to those thanks to a handy, built-in document editor ;
- keep a record of all actions (campaigns, letters, appointments,...) pertaining to a particular contact and manage them through time.

### 7.9.1 Rights related to Customer Relationship Manager

They are ruled at the *Modify User Page* (9.17) for instance as illustrated on Fig.7.53.  
For this user :

[*Menu script user rights* :]

- CRM - Menu : rules the access to the CRM add-on ;
- CRM - Commercial actions : rules whether a  is available at the *Client Management Page* (2.3) for client-related action popup to be displayed ;
- CRM - Forms : rules whether a  is available at the *Client Management Page* (2.3) to generate client-related predefined forms (7.9.10).

The other rights as displayed under [*CRM user rights* :] rule the management (reading, creating, modifying and deleting) of CRM's components :

- Actions (7.9.4) ;
- contacts (7.9.3) and contact lists (7.9.3.5) ;
- campaigns (7.9.7) ;
- letters (7.9.9) ;
- predefined form models (7.9.10).

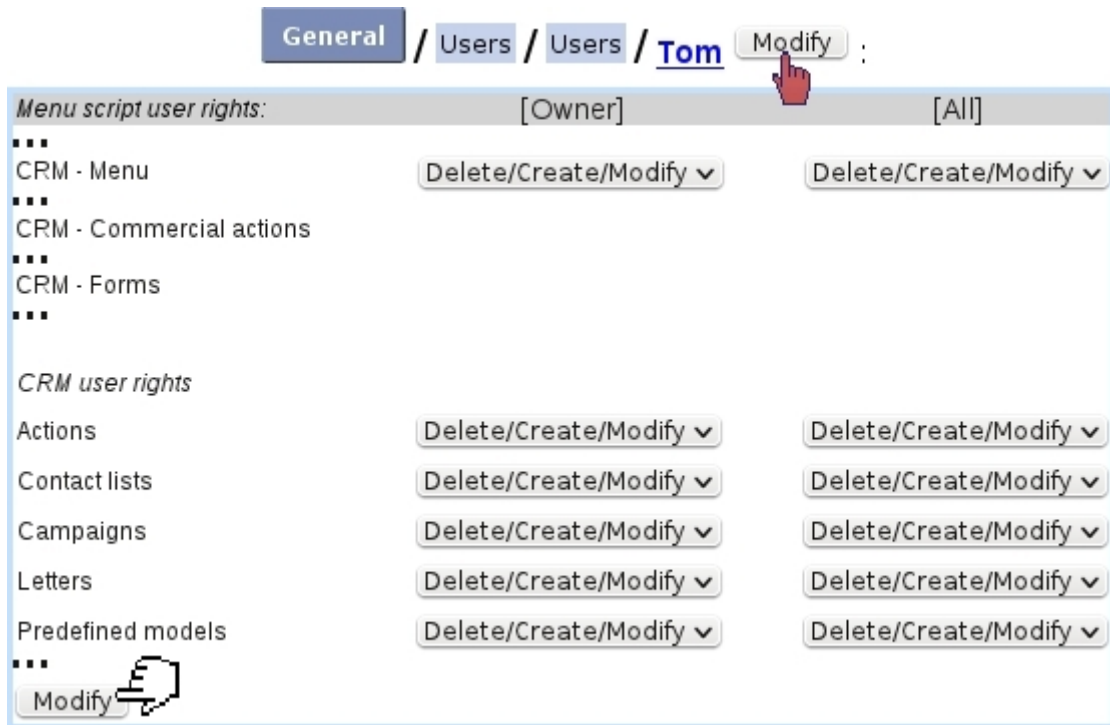


Figure 7.53: The user rights that rule Customer Relationship Manager.

## 7.9.2 CRM's Main Page



Figure 7.54: CRM's Main Page.

It is accessed via **Add-ons** / **CRM** and is featured at Fig.7.54.

There, a list of actions along with search tools (shown in a more detailed way at 7.9.6) is featured ; below, several buttons are available to access CRM's different components (they are available according to user's rights as explained above) :

- contacts (7.9.3) ;

- contact lists (7.9.3.5) ;
- campaigns (7.9.7) ;
- letters (7.9.9) ;
- predefined form models (7.9.10) ;
- statistics (7.9.11).

### 7.9.3 Contact managing

Everything related to the management of contacts (including the lists gathering them) is cleared up below.

#### 7.9.3.1 Adding a prospect

Prospects are added through **CRM** / **Contacts** / **Add a contact** ; the 'prospect' status is featured on the creating form (Fig.7.55).

#### 7.9.3.2 Uploading a list of prospects

It is also possible to upload a list of prospects via the means a file, which an example is given at Fig.7.56 : line by line, diverse information such as prospect's title, name, address,... are given, and the first line serves as to indicate the nature of the information.

Then, via **Contacts** / **Upload CSV file**, this very file is uploaded and CRM provides menus to indicate how each information given in the first line of the file will be taken as.

Clicking on **Ok** then leads to the *Preview Page* as featured in Fig.7.57, where the upload can be verified and finally validated.

#### 7.9.3.3 Upgrading a prospect

Should a prospect become one day a full-fledged client, this prospect's edit window (as attained through a contact search via **Modify**) features a **Migrate as new client** button that will create a new client file with the prospect's data.

#### 7.9.3.4 Searching for contacts

Contacts can be looked for via **CRM** / **Contacts**. There, as featured in Fig.7.58, a search tool very similar to the one in a *Search Client Page* (except that a drop-down menu allows to filter search by clients or prospects or both of them) provides several search criteria.

Prospects appear there in a light mauve background while regular clients appear in a grey one.

CRM / Contacts / Add a contact :

Add a contact

Company :	<input type="text"/>	**
Title :	<input type="text" value="Mr"/>	
Name :	<input type="text" value="Stagger"/>	**
First name :	<input type="text" value="Lee"/>	
Type :	<b>Prospects</b>	
Address :	<input type="text" value="10 O'Maley Street"/>	*
	<input type="text"/>	
City :	<input type="text" value="Los Angeles"/>	*
Zip code/Country :	<input type="text" value="90000"/>	* <input type="text" value="USA"/>
Phone/Mobile :	<input type="text" value="555 9510"/>	* <input type="text"/>
Office/Fax :	<input type="text" value="555 0101"/>	<input type="text"/>
E-Mail :	<input type="text"/>	
Language :	<input type="text" value="English"/>	
Comment :	<input type="text" value="This potential client is very interested in our products."/>	

(\*) required  
(\*\*) Name or company required

Add
Cancel

Figure 7.55: Adding a prospect.

A click on a client/prospect name displays in a pop-up windows her/his personal information. General information is featured such as city, zip, phone numbers... is featured ; also, if there is any, the next action (7.9.4) that as to be done for her/him.

The salesperson in charge for each contact (7.9.3.6), if s/he exists, is also featured.

As for buttons at the right, they allow to :

- **Actions** : displays the list of actions done on this contact (7.9.6.1) ;
- **Add action** : create a new action on this contact (7.9.4.1) ;
- **Add info** : create a new 'information' on this contact (7.9.5) ;
- **Letters** : view individual letters sent to this contact (7.9.9) ;

Prospects.csv:

```
company;title;name;first name;address;city;zip;country;phone;mail;language
Albatross INC;Miss;Berg;Lucia;11 Bungee Rd;Seattle;98100;US;5550203;berg@mailserv.com;EN
;Mr;Black;Chet;23 Beaver Ave;Fargo;58100;US;5556666;blackie@mailserv.com;EN
```

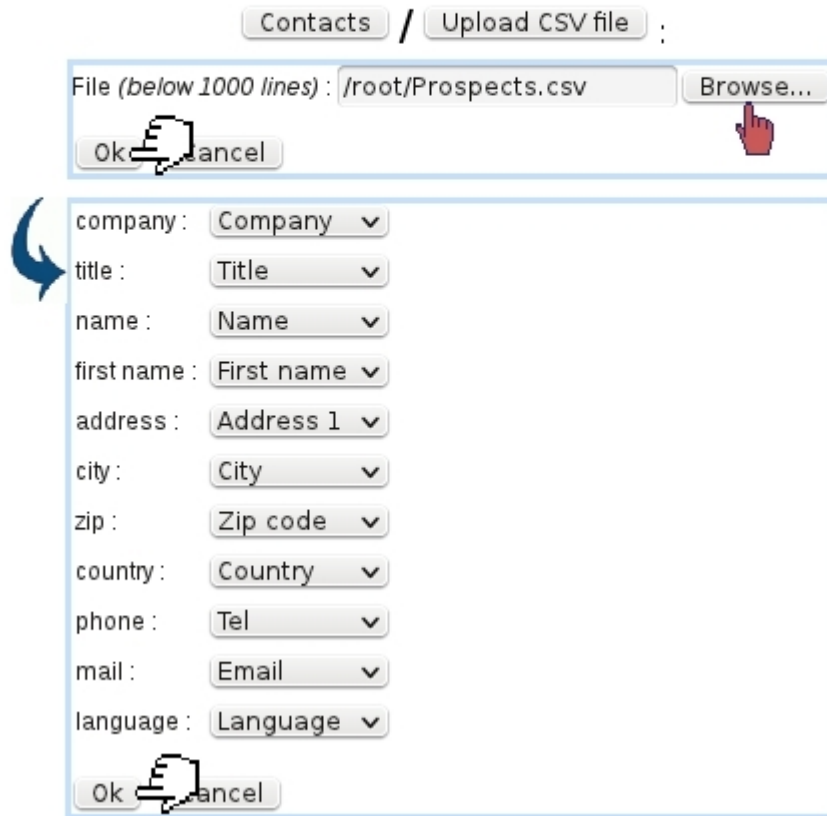


Figure 7.56: A `Prospects.csv` file, listing prospect data its own way is uploaded to CRM, on which matchings are made between the file's information (on the left, retrieved from its first line) and CRM's own prospect data presentation (menus on the right).

- **Modify** (for prospects only) : editing a prospect's general information, similarly as seen in Fig.7.55 (for modifying a client's general information, go at her/his *Client Management Page*).

### 7.9.3.5 Creating contact lists

According to common features shared by certain contacts (living in the same area,...), they can be gathered into contact lists, as shown in Fig.7.59. Then, on the page accessed via **Contact lists**, this newly created contact list can be displayed through a search.

In a process shown at Fig.7.60, contacts finally are added thanks to a search led in this case on the city.

Once created, a contact list's contents can be viewed via (in this example) **Contact lists**

[Preview Page] :

Preview of the 10 first contacts in list before CSV import

Ok  Cancel

<b>1 - Albatross INC Miss BERG Lucia</b>	
Address	<b>11 Bungee Rd</b>
	<b>98100 Seattle - USA</b>
Language	<b>English</b>
Tel	<b>5550203</b>
Mobile	
Fax	
Email	<b>berg@mailserv.com</b>
Category	<b>Default</b>
Comment	

---

<b>2 - Mr BLACK Chet</b>	
Address	<b>23 Beaver Ave</b>
	<b>58100 Fargo - USA</b>
Language	<b>English</b>
Tel	<b>5556666</b>
Mobile	
Fax	
Email	<b>blackie@mailserv.com</b>
Category	<b>Default</b>
Comment	

Figure 7.57: This *Preview Page* shows that the prospect data has been rightly imported.

/  / [L.A. residents.](#)

Also, contacts can be ed anytime in a similar way as above via [Modify](#) ; there, contacts can be individually unchecked to be removed from the list.

Finally, it is possible to [Delete](#) a list provided it does not contain any contacts.

**7.9.3.5.1 Creating/expanding a contact list via an upload** It is also possible, for a already-created contact list, to upload a CSV file of contacts via [Modify](#) /  . The uploading process is then similar as described in 7.9.3.2.

If contact list already contained contacts, the uploaded contacts are appended at the end of the list.

Contacts :

**Contacts**

Search contacts by :

Name/Company :  Zip code/City :

Address :  Tel :

Email :  Type / Language :

Name	City (Zip code)	Country	Tel	Mobile	Salesperson	To do				
<a href="#">Salazar Ramon</a>	Albuquerque (87100)	USA	555 6666		-	-	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/>
<a href="#">Scofield Michael</a>	Los Angeles (90000)	USA	555 8523		-	Visit	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/>
<a href="#">Seranescu Pompilius</a>	BH (90210)	USA			-	Appointment	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/>
<a href="#">Sheldon Helen</a>	Reno (89000)	USA	555 4563		-	Email	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/>
<a href="#">Smith John</a>	Los Angeles (90000)	USA	555 1234	6666666	-	-	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/>
<a href="#">STAGGER Lee</a>	Los Angeles (90000)	USA	5559510	62100000	-	Call	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/> <input type="button" value="Modify"/>

Figure 7.58: Looking for clients and prospects whose name begins by 'S' inside the contact database.

Contact lists / Add :

**Add a contact list** □ ×

Name :

Comments :

**Contact lists**

User :  - Title :  - Order by :  -

Title	Contacts	User	Creation	Modification	Usage	Owner	
<a href="#">L.A. Residents</a>	0	Jones Jack	28/10/2008 15:14	28/10/2008 15:14	n.a.	CRM	<input type="button" value="Modify"/> <input type="button" value="Delete"/>

Figure 7.59: Creating a contact list aimed to gather contacts living in the same city.

### 7.9.3.6 Salesperson in charge of a contact

CRM, in general, is a sales-oriented aspect of a company ; therefore, a dedicated salesperson (9.6.1) might often follow a prospect, from creation to commercial actions. Blue Chameleon's CRM module features this salesperson anytime a list of contacts is displayed, as it can be seen on Fig.7.58.



[Add contacts](#) :

**Add existing contacts to contact list**
☐ ✕

### Contacts

Search contacts by :

Name/Company :  Zip code/City :

Address :  Tel :

Email :  Type / Language :

	Name	City (Zip code)	Country	Tel	Mobile
<input checked="" type="checkbox"/>	Barnes Cletus	Los Angeles (90000)	USA	1	1
<input checked="" type="checkbox"/>	Bauer Kim	Los Angeles (90000)	USA	555 4525	
<input checked="" type="checkbox"/>	Durden Tyler	Los Angeles (90000)	USA		
<input checked="" type="checkbox"/>	Paper Street Soap Company	Los Angeles (90000)	USA	555 6669	
<input checked="" type="checkbox"/>	Parker Ken	Los Angeles (90000)	USA	555 6363	
<input checked="" type="checkbox"/>	Scofield Michael	Los Angeles (90000)	USA	555 8523	
<input checked="" type="checkbox"/>	Smith John	Los Angeles (90000)	USA	555 1234	6666666
<input checked="" type="checkbox"/>	STAGGER Lee	Los Angeles (90000)	USA	5559510	62100000

Figure 7.60: Adding contacts to a contact list.

Setting or changing the salesperson in charge of a contact is done when an action is taken on a contact, as described next.

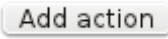
## 7.9.4 Actions

An 'action', in the Customer Relationship Manager context, is any deed that is accomplished on a contact, whether performed by yourself (phonecall, appointment,...) or processed by Blue Chameleon (sending of campaigns and letters), where it is labeled as a 'system action'.


In order to always follow closely a contact, actions are kept in record and may be edited, in the way of comment adding and due date editing.

Also, Blue Chameleon's strong feature for this matter is that distinction is made between past and future actions, the latter being dutifully reminded thanks to a dedicated CRM event control at your desktop (1.3 on how to set it).

### 7.9.4.1 Taking an action on a contact

As shown in Fig.7.58, after a contact search, a  button is available besides each contact.

Upon click, as displayed at Fig.7.61 :

- the current salesperson in charge of this contact is shown at the top ; in the current example, none is yet, so user Thomas Hanson (who has been set as a salesman, 9.6.1) checks the box 'Attribute contact to me' ;
- the status of the action (whether is to do or it has already been done) is set ;
- the action type (see details at 7.9.4.1.1 below) is set ;
- a date and time for this action are set thanks to the dedicated calendar icon  (7.9.4.2.1) ;
- a comment, describing the action, is written

Actions can also be created when an Agenda appointment is added (7.2.3.1), provided that the corresponding agenda supports CRM assignment (7.2.2.3.1).

**7.9.4.1.1 Types of actions** The 'Action type :' menu as found when creating (or modifying) an action contains the following choices :

- letter ;
- Email ;
- SMS ;
- Call ;
- Appointment ;

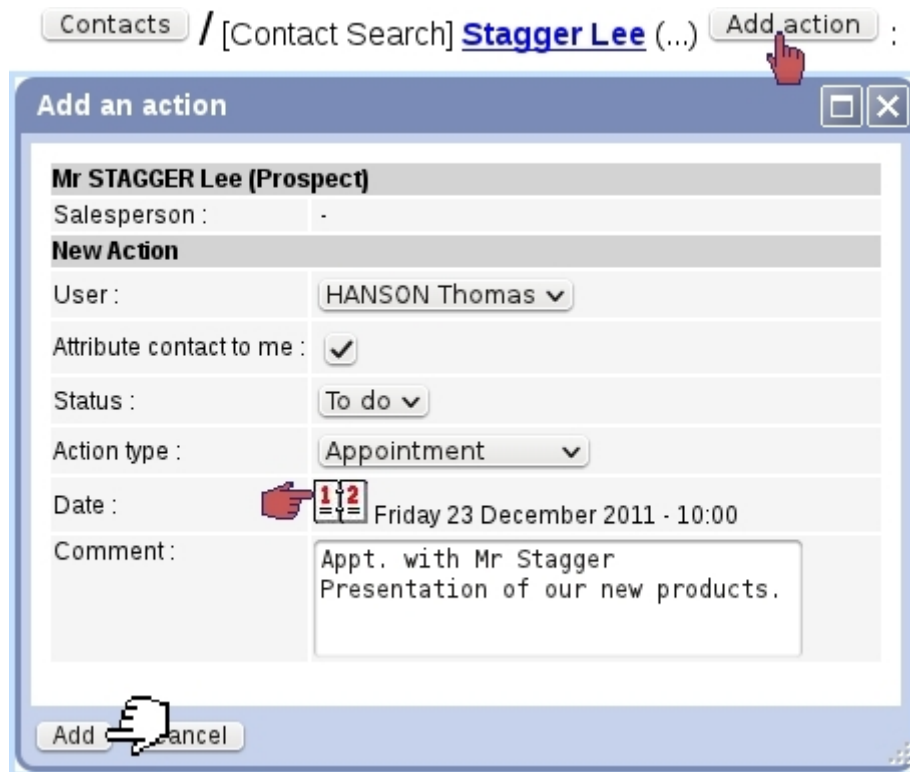


Figure 7.61: Registering an appointment taken with a contact ; the due date as it appears has been set in the way described at Fig.7.62.

- Visit (i.e., in opposition to an appointment, the contact has come her/himself to the company) ;
- Migration to client (as an action to do manually, 7.9.3.3).

#### 7.9.4.2 Managing past and future actions

Blue Chameleon's Customer Relationship Manager makes the distinction between actions that have been accomplished and action that still remain to be done. Once added as described in 7.9.4.1, it is possible to edit an action, in the ways described at 7.9.4.2.2.


**7.9.4.2.1 The Action calendar : scheduling actions** This calendar is brought up via the  icon as found next to an action date, in the context of action creation (Fig.7.61) or modifying (Fig.7.65).

Fig.7.62 shows for instance how a due date is scheduled while creating a new action. In this example, action is created on December, 16 and it concerns an appointment with a prospect that is meant to happen on December, 23 at 10 AM :

1. the calendar is displayed : the current date and time appear on the monthly view and time sliders;
2. December, 23 is then selected, and so is the time of the appointment ;



Figure 7.62: Setting the right date and time for a future action.

3. the appointment with the prospect now appears with the right date and time.

**7.9.4.2.2 Editing actions : examples** Blue Chameleon's Customer Relationship Manager ensures a great flexibility when it comes to actions. For instance, the following deeds are rendered possible :

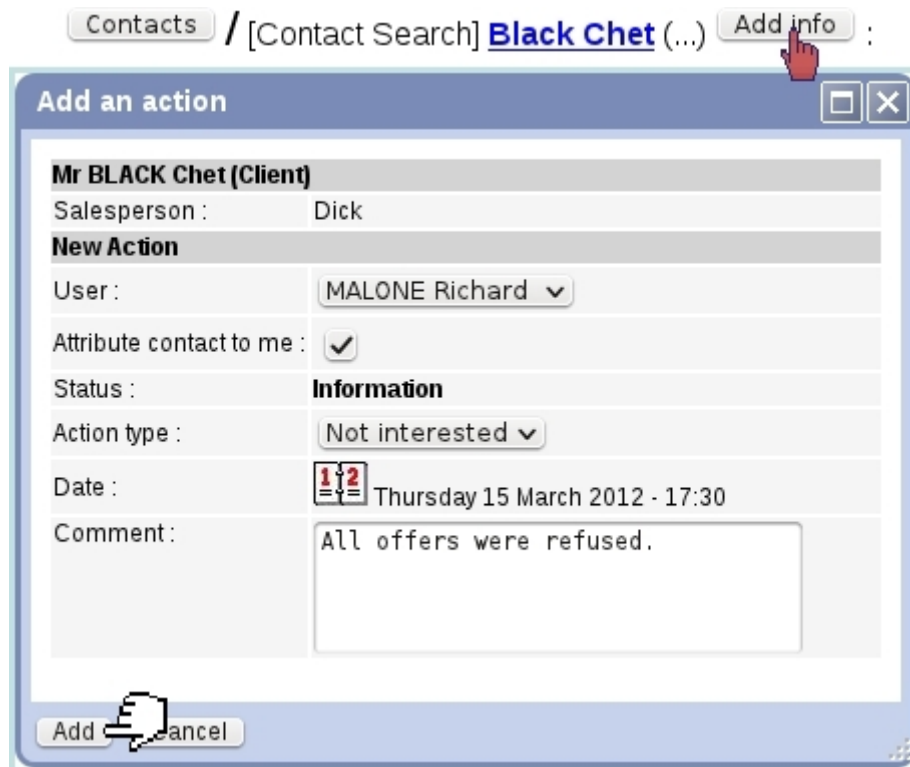
- if an action has been achieved without having been even created in the first place, it is still possible to create it. The creation process will remain the same, and the corresponding date (in the past) and time will be chosen. Also, it is possible to record an action that has been done in the past by just setting the right date and time ;
- postpone the due date and/or time of an action, even on the very day the action was due to happen, or after ;
- advance its due date and/or time, even, for example, schedule a future action on the current day ;
- update its commentary : for instance, after an appointment or a call has been made with a contact, write down the results of the meeting.

The editing of an action is most conveniently done from the page where actions can be searched and displayed (i.e. CRM's Main Page), as detailed next.

## 7.9.5 'Information' actions

'Information' actions, in opposition to the 'normal' actions as created above, just aim to feature some current status of the prospect, for instance whether s/he is not interested.

As featured at Fig.7.63, such an action is created for instance also after a contact search (7.58), this time through the **Add info** button ; data to input is similar as for a normal action, except that there is no 'To do/Done' menu.



The screenshot shows a software interface with a breadcrumb trail: **Contacts** / **[Contact Search] Black Chet (...)** **Add info**. Below this is a dialog box titled **Add an action**. The dialog contains the following information:

- Mr BLACK Chet (Client)**
- Salesperson : Dick
- New Action**
- User : MALONE Richard (dropdown menu)
- Attribute contact to me :
- Status : **Information**
- Action type : Not interested (dropdown menu)
- Date :  Thursday 15 March 2012 - 17:30
- Comment : All offers were refused. (text area)

At the bottom of the dialog are **Add** and **Cancel** buttons.

Figure 7.63: Indicating an information upon a prospect's state.

Available information types are :

- Interested ;
- Not interested ;
- Misc.

## 7.9.6 Looking for actions

The Main CRM Page (7.9.2), as now detailed in Fig.7.64, features all actions remaining to be done by the current, along with various search menus tool as featured where it is possible to look for actions with various search criteria :

- the issuing user, if rights for Actions ('All') are sufficient ;

- the related contact, along a search string featured in her/his name ;
- the status of the action : To do, Done, System action (i.e. sent campaigns, letters, and validated migrations to client), and 'Information' actions (7.9.5) ;
- also, displaying a certain number of actions and ordering them along date, status or user.

CRM :

**Actions**

User: JONES Jack - Contact: - Status: To do - Type: Call - Search

Displayed actions: 25 - Order by: Date

Date	User	Contact	Action	Status	Type				
28/12/2011 10:30	Jones Jack	<a href="#">STAGGER Lee</a>	Call for a satisfaction p...	To do	Call	Modify	Done	Action	Information
27/12/2011 16:00	Jones Jack	<a href="#">Scofield Michael</a>	Mitigate complaint.	To do	Call	Modify	Done	Action	Information

Actions 1-2/2

Contacts Contact lists Campaigns Letters Predefined models Statistics

Figure 7.64: This displays for instance all phone-call actions remaining to be done.

From there, for an action :

- **Modify** allows the action to be updated (Fig.7.65) ;
- **Done** (only for 'normal' actions that are still to do) declares this action as 'Done' ;
- **Action** shows the popup to add a 'normal' action (7.9.4.1), preset to the related contact and action type of the line ;
- **Information** shows the popup to add an 'Information' action (7.9.5), preset to the related contact of the line.

### 7.9.6.1 List of actions for a contact

While on a list of contacts where the **Actions** button is available (for instance as seen on Fig.7.58), this button leads to a similar page as the action search page as detailed above except it is dedicated to that very contact.

If the CRM event control has been enabled (1.3), it is possible then, as shown on Fig.7.66, to remind what actions have to be done in the near future.

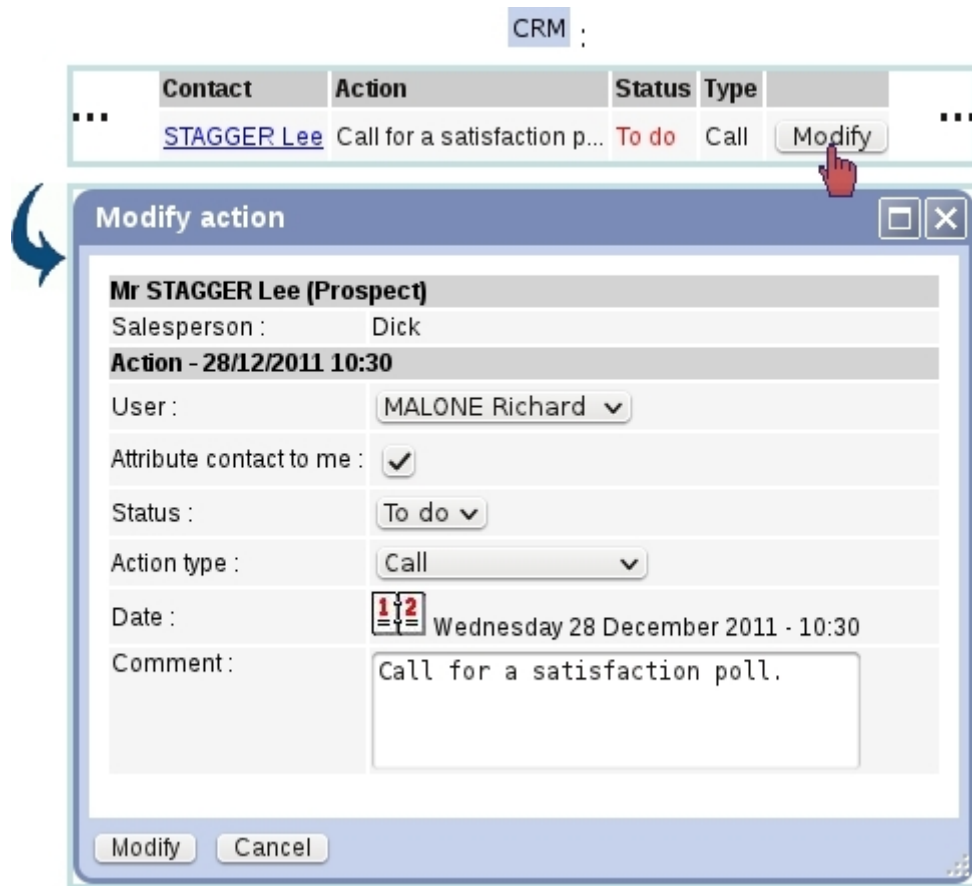


Figure 7.65: An action can be modified and updated anytime.

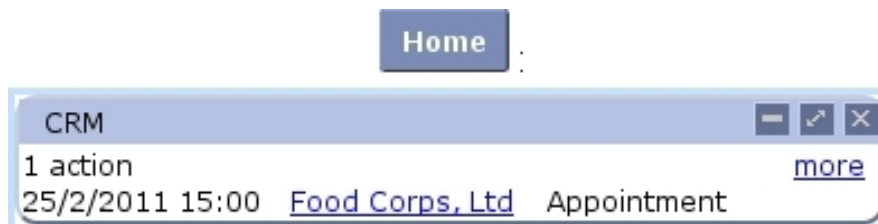


Figure 7.66: The CRM event control, here reminding that an appointment with a client is scheduled.

Clicking on the [Client Name](#) leads to the page where all actions for this contact are displayed, while the [more](#) link simply leads to the 'normal' CRM Main Page.

## 7.9.7 Postal campaigns

Blue Chameleon's CRM tool enables to generate mass mailing campaigns to contact lists. It also integrates a Document Editor, allowing to create model documents. Its use is explained at 13.1.

### 7.9.7.1 Adding a new postal campaign

Fig.7.67 shows how to create a new postal campaign : on the pop-up window as displayed via **Campaigns** / **Add a campaign** , pick user and type (in the following example, 'Postal campaign') and fill in its title.



Figure 7.67: Creating a new postal campaign.

Campaigns, on their main page, can be searched along creating user, title (or part thereof), type (postal/electronic) and status ; campagne results can be ordered by :

- creation date ;
- title ;
- user ;
- type.



This newly-created campaign is assessed the state 'opened' and has still no contacts nor associated documents. A campaign can then be modified and assessed contacts and documents via, as pictured in Fig.7.68, a click on its name (a campaign can be searched anytime via a dedicated search tool). There, several buttons enable to enrich this campaign with contacts as well as documents as explained below.

[Campaign Search] [New Offer for L.A. Residents !!](#) :

**Campaign : View/Modify**

**Campaign : New Offer for L.A. Residents !!**

User : **Jones Jack**

Type : **Postal campaign**

Title : **New Offer for L.A. Residents !!**

Status : **Opened**

**Contact list**

<No contact>

**Document**

Figure 7.68: This page allows to manage a campaign (for which, currently, no contact list nor document have been added).

### 7.9.7.2 Adding a contact list to a postal campaign

Through the  button as seen in Fig.7.68, contacts are added to campaign in a simple way pictured at Fig.7.69.

/ [Campaign Search] [New Offer for L.A. Residents !!](#) /  :

**Choose contact list** □ ×

User :  - Title :  -

	Title	Contacts	Modification	User
<input checked="" type="radio"/>	L.A. Residents	8 (1 prospect(s), 7 client(s))	20/1/2012 11:55	Jack Jones

**Contact list**

[L.A. Residents - 8 contact\(s\)](#) (1 prospect(s), 7 client(s))

Figure 7.69: Adding the right contact list (7.9.3.5) to a postal campaign.

### 7.9.7.3 Adding a document to a postal campaign

A model document is what will be sent or printed out for this campaign. If no model document was created for this specific campaign, click on **New model** and follow the how-to as described in 13.3.1.

To upload an already-existing model document, click on **Select model** as available at the *Campaign Manage Page* (Fig.7.68). Then, a File Manager window as described in 7.4 will be displayed, where an already-existing model document is selected ; via a click, it can also be modified and expanded through the Document Editor : see 13.1 for the Document Editor general use.

Whether created or selected, as shown for instance on Fig.7.70, document's name finally appears at the *Campaign Manage Page* ; clicking on it allows to view and modify it via the Document Editor. It is also possible to **Generate PDF file** for this campaign document : once PDF generation is done, it becomes possible to see the PDF file to be printed out via **Print PDF file**. If result was not satisfactory, **Remove PDF file** can be used to delete it.

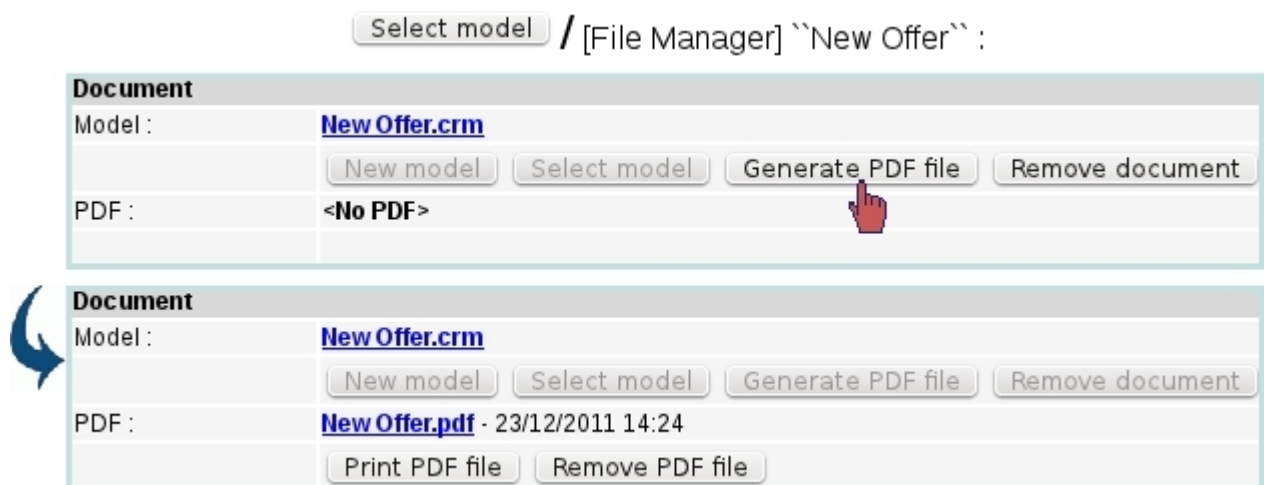


Figure 7.70: Uploading the model document "New Offer" (see 13.3 for details on its creation) and generating the corresponding PDF file.

### 7.9.7.4 Marking a postal campaign as 'sent'

Once you printed out the PDF file as generated through **Print PDF file** and sent the sheets to your contacts, follow the process as shown on Fig.7.71 to mark this campaign as 'sent'.

[After postal campaign has been printed out and sent] :

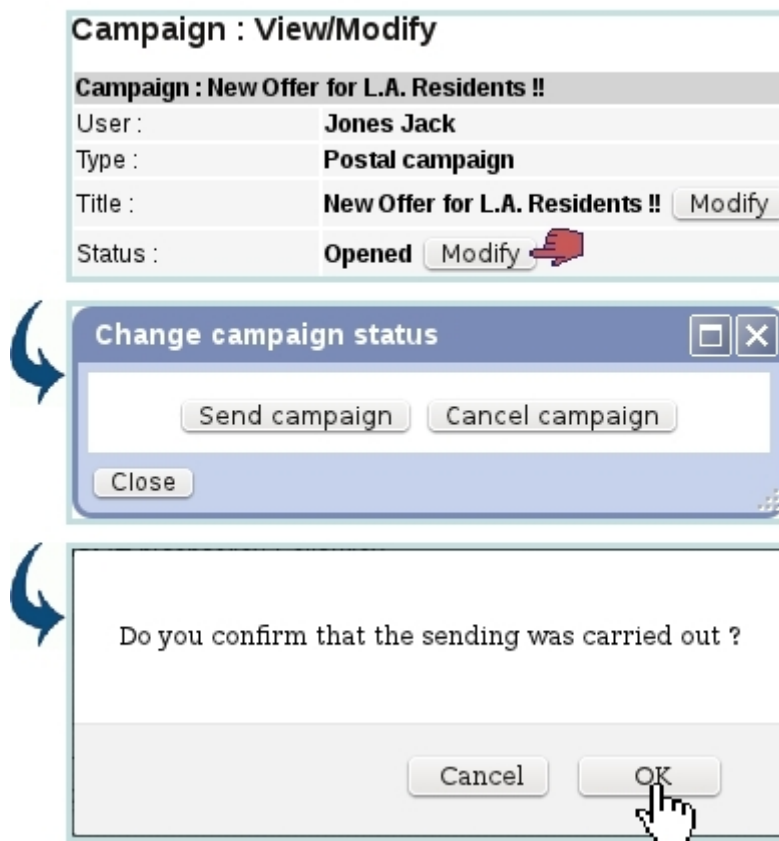


Figure 7.71: Marking as postal campaign as 'sent'.

#### 7.9.7.5 Duplicating a sent postal campaign

The *Campaign Manage Page* (7.68) for a sent campaign features a **Duplicate** button allowing to make a copy of that campaign, in a process shown at Fig.7.72. This new campaign can then be renamed via the **Modify** button.

This new campaign contains as default the contact list and model document of the campaign it has been copied from, but it can be changed respectively via **Choose** and **Remove document**.

#### 7.9.7.6 Canceling an unsent postal campaign

If there is need to abort a yet unsent campaign, the **Cancel campaign** button as seen in Fig.7.71 will be used. The cancelled campaign still remains in the list of campaigns and can be duplicated.

### 7.9.8 Electronic campaigns

Electronic campaigns are managed in a very similar way as postal ones (7.9.7) ; instead of paper mails, campaign is dispatched to the contacts via their emails. This functionality

[After postal campaign has been declared 'sent'] :

The image shows a sequence of four campaign record cards. The first card is titled 'Campaign : New Offer for L.A. Residents !!' and has fields for User (Jones Jack), Type (Postal campaign), Title (New Offer for L.A. Residents !!), and Status (Sent - 23/12/2011). A 'Duplicate' button with a hand cursor is visible. A blue arrow points from this card to the second card. The second card is titled 'Campaign : Copy of New Offer for L.A. Residents !!' and has fields for User (Jones Jack), Type (Postal campaign), Title (Copy of New Offer for L.A. Residents !!), and Status (Opened). A 'Modify' button with a hand cursor is visible. A blue arrow points from the second card to the third card. The third card is titled 'Campaign : Copy of New Offer for L.A. Residents !!' and has fields for User (Jones Jack), Type (Postal campaign), Title (New Offer for Reno Residents !!), and Status (Opened). An 'Update' button with a hand cursor is visible. A blue arrow points from the third card to the fourth card. The fourth card is titled 'Campaign : New Offer for Reno Residents !!' and has fields for User (Jones Jack), Type (Postal campaign), Title (New Offer for Reno Residents !!), and Status (Opened). A 'Modify' button with a hand cursor is visible.

Figure 7.72: Making a copy of a 'sent' campaign.

also uses the Document Editor (13.1).

### 7.9.8.1 Creating an electronic campaign

An electronic campaign is created most easily along those following steps :

- selecting this time 'Electronic campaign' in the 'Type:' menu as shown on Fig.7.67 ;
- associating a contact list like in 7.69 ;
- adding in the **Email Header** zone information specific to this type of campaign, as illustrated in Fig.7.73 ;
- associating a new document or an already-existing one like in 7.9.7.3.

Once all steps above are fulfilled, the **Visualize** button as illustrated on Fig.7.74 allows to create a PDF file that can be saved or printed out as a reminder for that electronic campaign. An 'Attached file:' field allows to attach any document to the electronic campaign (7.9.8.4).

## Weekly Newsletter :

The screenshot shows a web interface for creating an email campaign. At the top, there is a section titled "Contact list" with a link to "L.A. Residents - 8 contact(s) (1 prospect(s), 7 client(s))" and a "Choose" button. Below this is the "Email header" section with fields for "From : <Your email address>", "CC :", "BCC :", and "Subject :". A "Modify" button is located at the bottom of this section, with a red hand icon pointing to it. A blue arrow points from this "Modify" button to a separate "Email header" dialog box. This dialog box has a title bar with "Email header" and window control buttons. It contains input fields for "From : contact@retailfc.com", "CC :", "BCC :", and "Subject : Weekly Newsletter". At the bottom of the dialog are "Modify" and "Cancel" buttons, with a white hand icon pointing to the "Modify" button.

Figure 7.73: Creating the header of the electronic campaign 'Weekly Newsletter'.

[After "Weekly Newsletter" has been edited with email information and model document has been associated] :

The first screenshot shows the "Email" configuration interface. The "Model" field is set to "Electronic Nwsltr.crm" and has buttons for "New model", "Select model", "Visualize", and "Remove document". The "PDF" field is set to "<No PDF>" and has a red hand icon pointing to it. The "Attached file" field is set to "<None>" and has an "Add" button. A blue arrow points from the "Visualize" button to the second screenshot. The second screenshot shows the same "Email" configuration interface, but the "PDF" field is now set to "Electronic Nwsltr.pdf - 3/3/2012 10:15" and has buttons for "Print PDF file" and "Remove PDF file".

Figure 7.74: Creating a PDF file that sums up the electronic campaign.

Example extracts of that PDF file are shown at Fig.7.75.

Print PDF file :

**Email campaign**

**Title :** Weekly Newsletter

**User :** Jack Jones

**Creation date :** 3/3/2012 15:42

**Contact list :** L.A. Residents

**Contact number :** 8 contact(s)  
*1 prospect(s)*  
*7 client(s)*

---

**From :** contact@retailfc.com  
**To :** kim.bauer@mailserv.com  
**Cc :**  
**Bcc :**  
**Subject :** Weekly Food Information Newsletter

Hello Dear suscribers of RFC Newsletter !  
[...]

---

**From :** contact@retailfc.com  
**To :** tyler.durden@mailserv.com  
**Cc :**  
**Bcc :**  
**Subject :** Weekly Food Information Newsletter

Hello Dear suscribers of RFC Newsletter !  
[...]

Figure 7.75: The PDF file generated for an electronic campaign features the campaign's general information as well as the contents of the emails sent to each member of the contact list.

### 7.9.8.2 Sending an electronic campaign

Once **Visualize**'d, an electronic campaign is sent in an identical manner as a postal one, that is to say by clicking on the **Send campaign** button as seen in Fig.7.71. This marks the electronic campaign as 'sent', and in this case, sends the emails to the members of the selected contact list.

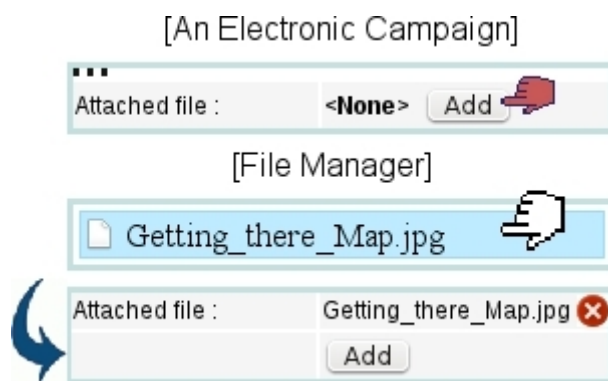
### 7.9.8.3 Duplicating or canceling an electronic campaign

The duplication and cancellation of an electronic campaign are achieved similarly as for postal campaigns ; please refer to respectively 7.9.7.5 and 7.9.7.6.

### 7.9.8.4 Attaching a file to an electronic campaign

Blue Chameleon allows to add an attachment to all the e-mails that will be sent through the electronic campaign. For this to be done, the attachment must be uploaded first to the File Manager (7.4.1.1).

As soon as model document is selected, the 'Attached file:' field becomes available ; then, clicking on **Add** shows the File Manager where aimed document is selected. Its name is finally featured in the aforementioned field, before a **✖** icon that permits to remove it :



Another attachment can then be added in the same way, to a maximum of 5.

## 7.9.9 Postal/electronic letters

In contrast to postal/electronic campaigns, letters are destined to *one particular contact*. The process of creating a new letter, for instance of the postal kind, is shown at Fig.7.76.

Once created, clicking on a letter's attached document name (here, [<No document>](#) for that matter), allows as illustrated on Fig.7.77 to manage this letter. This page displays all the contact's information as well as the same document and status buttons as for campaigns : indeed, the document creation/upload and (in this case) associated PDF generation (7.9.7.3), sending (7.9.7.4), duplicating (7.9.7.5) and cancellation (7.9.7.6) are indeed done in the same exact way as for campaigns.

The sending of an electronic letter similarly follows the same guidelines as an electronic campaign (7.9.8).

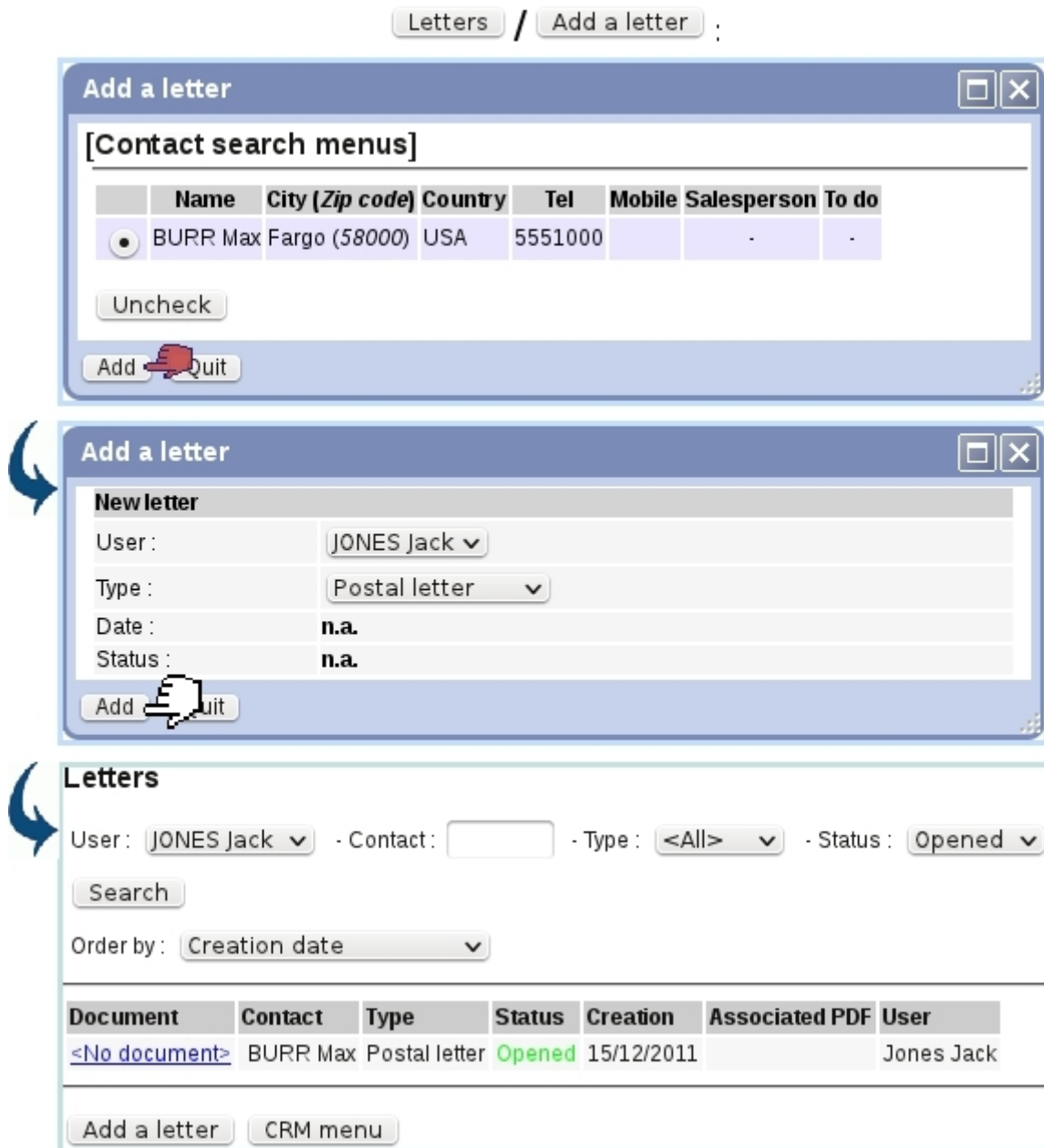


Figure 7.76: Creating a new postal letter for prospect Max Burr.

### 7.9.10 Predefined forms

The use of campaigns and letters as described above is fine for documents that have to be sent periodically ; now, the need to generate postal/electronic documents ready to be printed/sent right at the moment might surface.

It is particularly true for documents which have to feature the client's general information, such as repair sheets, quotes, etc...

Blue Chameleon allows to compose such documents, named 'Forms' in an easy way through the document editor ; they will be then generated through the client's own



[<No document>](#) :

Letter : View/Modify	
<b>Letter information</b>	
User :	Jones Jack
Type :	Postal letter
Date :	15/12/2011
Status :	Opened <input type="button" value="Modify"/>
<b>Contact</b>	
Name :	Mr BURR Max
Type :	Prospects
Address :	5 Garden St.
City :	Fargo
Zip code / Country :	58000 / USA
Tel :	5551000
Mobile :	
Fax :	
E-Mail :	
<b>Document</b>	
Model:	<a href="#">Indiv.Prosp. Ltr.crm</a>
	<input type="button" value="New model"/> <input type="button" value="Select model"/> <input type="button" value="Generate PDF file"/> <input type="button" value="Remove document"/>
PDF:	<a href="#">Indiv.Prosp. Ltr.pdf</a> - 15/12/2011 15:15
	<input type="button" value="Remove PDF file"/>

Figure 7.77: This page allows to do any letter-related action in the same way as for campaigns.

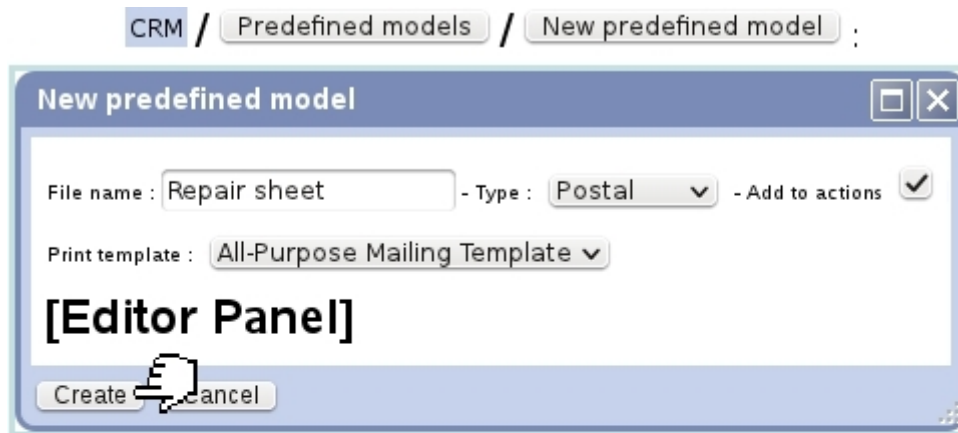
*Management Page.*

### 7.9.10.1 Writing predefined form models

A new form model is created as shown on Fig.7.78. There, similarly as for campaign or letter creation, a Document Editor popup shows (13.3.1), with the following elements to fill :

- a name under which to save this predefined model ;
- whether this model will be used for a print-out (postal) or mail-send (electronic) purpose ;
- whether a CRM action will be automatically created when form is generated or sent ;
- a print template (13.2).

Once created, a form model can be modified or deleted.



[After file has been saved :]



Figure 7.78: Creating a new predefined form model.

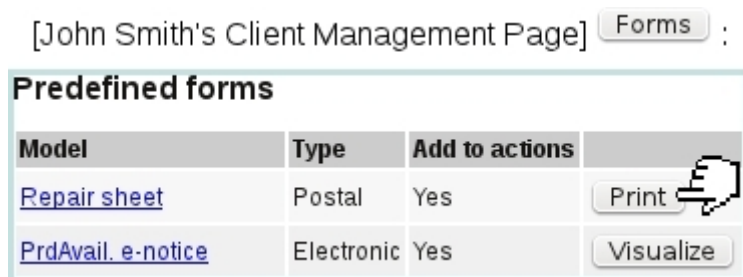


Figure 7.79: Generating a form ready to be printed out for client John Smith.

### 7.9.10.2 Generating a form

On a client's *Management Page* (2.3), as featured as an example in Fig.7.79, the **Forms** button allows then to generate the forms corresponding to the models defined as described above, and also to automatically insert an action if predefined model has been defined to.

'Postal' forms have a **Print** button that, upon click, displays the corresponding PDF, of which an example is displayed at Fig.7.80.

'Electronic' forms, on the other hand hand, have a **Visualize** button leading to a page where email information (such as the sender, subject...) has to be given before sending (Fig.7.81).

[Result on generated PDF] :

**Retail Food, Co**

Retail Food Company  
41, Green Hill Road  
Los Angeles 90000  
Ph : 555 9630  
contact@retailfc.com

## REPAIR SHEET

**First name :** John  
**Last name :** Smith  
**Address :** 12 Orange Road  
**City :** Los Angeles  
**Zip :** 90000

**Item :** \_\_\_\_\_  
**Repairman :** \_\_\_\_\_

Done on : 21/01/2011 - 9:50  
Signature: \_\_\_\_\_

---

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Figure 7.80: An example of a form to be printed out.



*These examples make good use of "Client (and other) variables" (13.1.6), allowing to feature client information as well as date, time... without knowing them in advance.*



Figure 7.81: Sending a dedicated email right from the client's page, and also creating an action for the record.

### 7.9.11 Action statistics

As time passes, more and more actions, whatever their type, are added to the system ; to keep a clear, quantitative view of the actions that have been done by type and status (especially how many actions remain to be done) as well as compare the performances of the various users, Blue Chameleon provides a action statistic tool, as accessible from CRM's main page.

As featured on Fig.7.82, a menu allows to select a specific user (or all of them) and a range of dates (corresponding to actions' due dates). Results are twofold : a table for the 'normal' actions (7.9.4) and a table for the 'Information' actions (7.9.5).

For each of those, number of actions according to each type are shown ; and for nor-

mal actions, numbers of actions to do, to be done and done by the system are displayed. Type names as well as the two 'TOTALS' are click-links, which lead to an action search page (7.9.6), for which the User and Action type menus already preset and the action status set to 'To do'.

For instance, clicking on the 'SMS' link would show, for the selected user, all SMS actions remaining to be done.

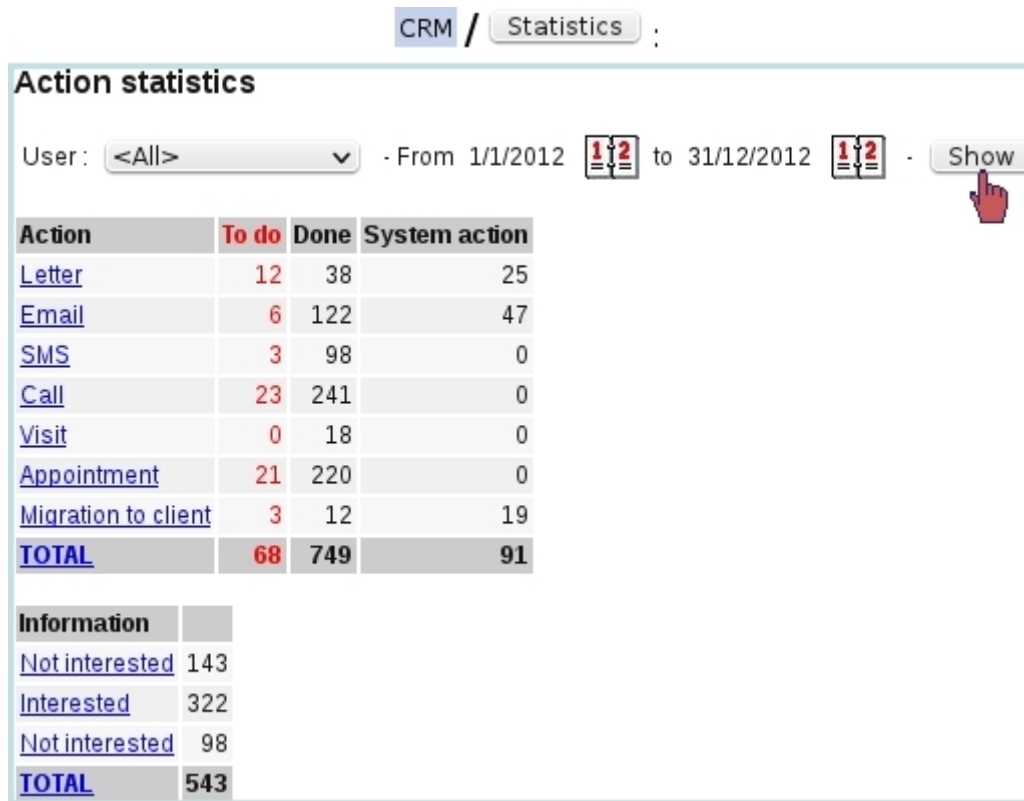


Figure 7.82: A complete, numerical view on actions.

### 7.9.11.1 Action statistics, on a specific contact list

For more targeted action statistics, as featured on Fig.7.83, a viewed contact list can offer similar action-wise statistics, related on the contacts it contains.

CRM / Contact lists / [Contact List Search] [L.A. residents](#) :

### View contact list

Name : **L.A. Residents**  
User : **Jack Jones**  
Comments : **Clients and prospects living in L.A. or vicinity.**  
Number of contacts : **8 (7 clients, 1 prospect)**

---

## [List of contacts]

---

### Action statistics

From 1/1/2012   to 31/12/2012   -

Action	To do	Done	System action
<a href="#">Letter</a>	3	5	10
<a href="#">Email</a>	2	32	15
<a href="#">SMS</a>	1	31	0
<a href="#">Call</a>	8	71	0
<a href="#">Visit</a>	0	6	0
<a href="#">Appointment</a>	21	73	0
<a href="#">Migration to client</a>	1	4	5
<b>TOTAL</b>	<b>36</b>	<b>222</b>	<b>30</b>

Information	
<a href="#">Not interested</a>	41
<a href="#">Interested</a>	106
<a href="#">Not interested</a>	28
<b>TOTAL</b>	<b>175</b>


Figure 7.83: These are the actions statistics pertaining to all contacts of a contact list.

## 7.10 Projects/Timesheets

Projects aim at representing, for a client, a series of works, tasks, etc. made by your company.

This work can be accounted for and represented at the same time as timesheets, which might even give the possibility to be invoiced.

The Blue Chameleon add-on that allows these acts to be performed, on a daily basis, is accessible via **Add-ons** / **Projects/Timesheets**.



*Project/Timesheet access user rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

[Menu script user rights :] Projects/Timesheets

### 7.10.1 Rights related to Projects/Timesheets

They are ruled at the *Modify User Page* (9.17) for instance as illustrated on Fig.7.84.



The screenshot shows the 'Modify' page for user 'Tom'. The breadcrumb trail is 'General / Users / Users / Tom Modify'. The main content area is titled 'Menu script user rights:' and has two columns: '[Owner]' and '[All]'. Under the 'Projects/Timesheets' section, there are several rows of settings:

	[Owner]	[All]
Projects	Create/Modify ▾	Create/Modify ▾
Timesheets	Delete/Create/Modify ▾	Delete/Create/Modify ▾
Is featured in user menus	Yes ▾	
Print/export management	Print/export ▾	Print/export ▾
Bill management	Administration ▾	Administration ▾

At the bottom left, there is a 'Modify' button with a hand cursor icon.

Figure 7.84: The user rights that rule Projects and Timesheets, for a 'manager' user.

For this user :

[Menu script user rights :]

- Projects/Timesheets : rules the access to the Projects/Timesheets add-on

The other rights as displayed further down under [*Projects/Timesheets*] rule the management of :

- Projects (7.10.3), for oneself and for all users (None, View, Create/Modify) ;
- Timesheets (7.10.8), for oneself and for all users (None, View, Modify, Delete/Create/Modify) ;
- whether user will be featured in 'User' menus (as featured on timesheet pages) : this menu must be set to 'Yes' for users who will be featured in timesheets, and 'No' for users who will never have timesheets created in their name. This is useful for making 'User' menus less long ;
- Printing and exporting timesheets (7.10.8.5), for oneself and for all users ;
- Invoicing timesheets : rights can be as low as None, then View, Modify (i.e. choose whether a Timesheet is billable or not (7.10.8.1, 7.10.8.2)), Invoice (create an invoice related to a timesheet, 7.10.9) and Administration, ruling which service articles can be defined for which user (7.10.7). This right, as usual, applies for oneself and for all users.

When Administration is chosen for 'Bill Management', user can also access the *Administration Page* (7.10.7).

## 7.10.2 *Projects/Timesheets main page*

With rights configured as in Fig.7.84, the *Projects/Timesheets main page* shows what is featured at Fig.7.85.

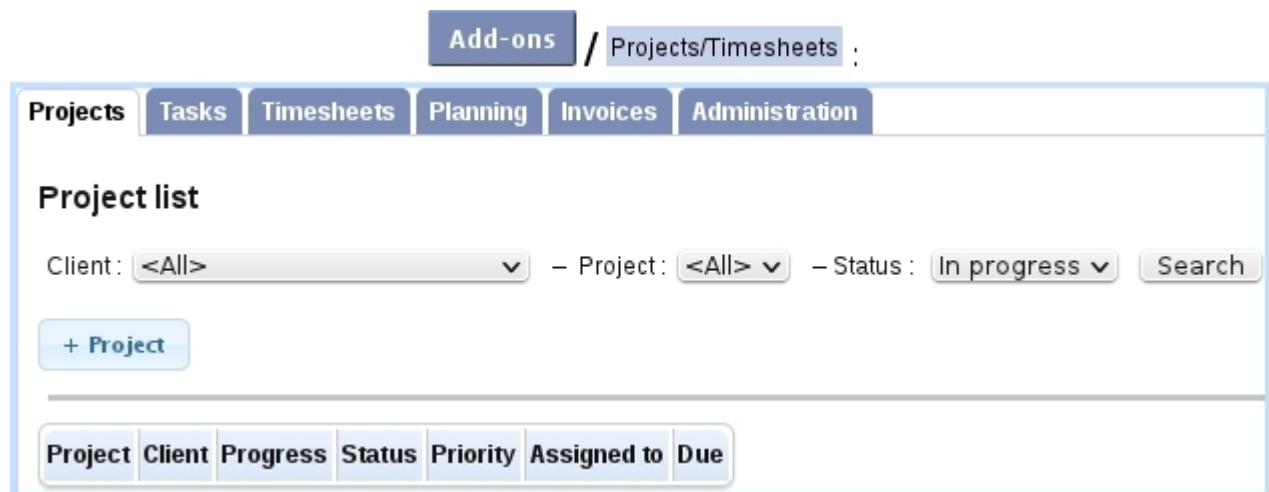


Figure 7.85: The *Projects and Timesheets Main Page*.

Tabs (provided rights are sufficient) on the top can be clicked to access the different parts of the Projects/Timesheets add-on :

- Projects (7.10.3), Tasks (7.10.4) and Planning (7.10.6) tabs, appearing if 'Projects' rights are at least 'View' ;
- Timesheets (7.10.8) tab, appearing if 'Timesheets' rights are at least 'View' ;




- Invoices (7.10.9) tab , appearing if 'Bill management' rights are at least 'View' ;
- Administration (7.10.7) tab , appearing if 'Bill management' rights are 'Administration'.

### 7.10.3 Projects

*Main Projects Page* is accessed via the Project tab ; from here, projects can be searched and created.

#### 7.10.3.1 Creating a project

Creating a project is done by clicking the  button, where choice is then given between 'Client project' and 'Internal project' (attached to no client). Fig.7.86 shows how a client project is created. There, user can define :

- a label, short label and comments ;
- a starting status ('In progress' or 'Pending') ;
- a priority ('Low', 'Normal', 'High' or 'Critical') ;
- a due date ;
- the enabling of a maximum number of logged hours and amount, when project's related timesheets will be created and invoiced ;
- rights for each user group, 'None' for no access at all to this project ; 'View' only or 'Modify'.

Upon creation, one is redirected to the *Manage Project Page*, that can also be access on the *Main Projects Page* by clicking project's name :

[Projects Tab] :

**Project list**

Client:  – Project:  – Status:

Project	Client	Progress	Status	Priority	Assigned to	Due
<a href="#">Ad Campaign 2014</a>	Marshall Justin	–	In progress	Normal	admin	31/01/2014

↓  
to Project Manage Page

[Projects Tab] / [+ Project](#) Client project / [Client Search] :

**New project**

For : [istn.mrsh73](#)

Label :

Short label :

Comment :

Status :

Priority :

Due date : 31/01/2014

Enable max amount/number of hours :

Enable preferred services :

---

**Rights :**

Accounting :  None  View  Modify

Administrator :  None  View  Modify

Customer Support Group :  None  View  Modify

External Relations :  None  View  Modify

Sales Department :  None  View  Modify

---

Figure 7.86: Adding a new project for a client.

### 7.10.3.2 Managing a project

Whenever a project click-link is featured, it leads to the *Manage Project Page*, as shown on Fig.7.87.

There, it is possible to :

- modify this project's main data (7.10.3.3) ;
- access its timesheets (7.10.8) ;
- access its invoices (7.10.9) ;

**Ad Campaign 2014 :**

**Ad Campaign 2014 [jstn.mrsh73]** ← Project list

Status : **In progress** – Priority : **Normal** – Planned amount : 0.00 – Planned hours : 0 – Assigned to : admin – Owner : admin – Due : 31/01/2014

Modify
Timesheets
Invoices
Print overview

---

**Tasks** +

*No task*

---

**Actions** + (  System actions)

06/12/2013 09:39 admin	<b>Label :</b>	<b>Ad Campaign 2014</b>
	<b>Status :</b>	<b>In progress</b>
	<b>Priority :</b>	<b>Normal</b>
	<b>Due date :</b>	<b>31/01/2014</b>
	<b>Assigned to :</b>	<b>admin</b>
	<b>Owner :</b>	<b>admin</b>

06/12/2013 09:39 **Created**  
admin **All designs for 2014 advertisement campaign.**

Figure 7.87: This page allows to manage and access all data related to a project.

- print a general overview of the project, in the same layout as a full-featured (all timesheets, all users) PDF print (7.10.8.5), with further invoice-related information ;
- view and add tasks to the project (7.10.4) ;
- view and add actions to the project (7.10.3.4).

### 7.10.3.3 Modifying a project

As featured on Fig.7.88 the following properties of a project can be updated :

- label, short label, status and priority ;
- amount and hours planned, provided project had been created with the enabling thereof (7.10.3.1) ;
- owning user and user it is assigned to (so as to appear on user's Event Control, 7.10.5) ;
- rights, in a similar manner as for creation ;
- project's allowed services (7.10.3.5).

Any validated update is then logged as an system 'action'. User actions can be created anytime, as described next.

[Manage Project Page] Modify :

Label : <input type="text" value="Ad Campaign 2014"/>	<span style="border: 1px solid #ccc; padding: 2px 5px;">Rights ↓</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">Services ↓</span>
Short I. : <input type="text" value="AdCpgn14"/>	
Status : <span style="border: 1px solid #ccc; padding: 2px 5px;">In progress ▼</span> Priority : <span style="border: 1px solid #ccc; padding: 2px 5px;">Normal ▼</span>	
Amount planned : <input type="text" value="20000"/> Hours planned : <input type="text" value="38"/>	
Due : <input type="text" value="31/01/2014"/> <span style="border: 1px solid #ccc; padding: 2px 5px;">1 2</span>	
Assign to : <span style="border: 1px solid #ccc; padding: 2px 5px;">admin ▼</span> Owner : <span style="border: 1px solid #ccc; padding: 2px 5px;">admin ▼</span>	
<span style="border: 1px solid #ccc; padding: 2px 10px;">Validate</span> <span style="border: 1px solid #ccc; padding: 2px 10px;">Cancel</span>	

Figure 7.88: Updating a project.

### 7.10.3.4 Project actions

Whenever something new is done on the project, or just for information purposes, one can add a project action as shown at Fig.7.89.

[Manage Project Page] :

... **Actions** + (  System actions )

**Add action :**

Prelim docs have been sent.

+ Add file...

Add Cancel

Figure 7.89: Adding an action for a project.

Also, to each action, it is possible to add a file, accessible at any point of the project's history.

### 7.10.3.5 Allowed services for a project

The Services ↓ button as found on the Modify Project interface (Fig.7.88) serves as to define which services (which are in fact shop articles that are counted in a hourly way)

are proposed adding a timesheet for that project.

Fig.7.90 shows how articles can be added.

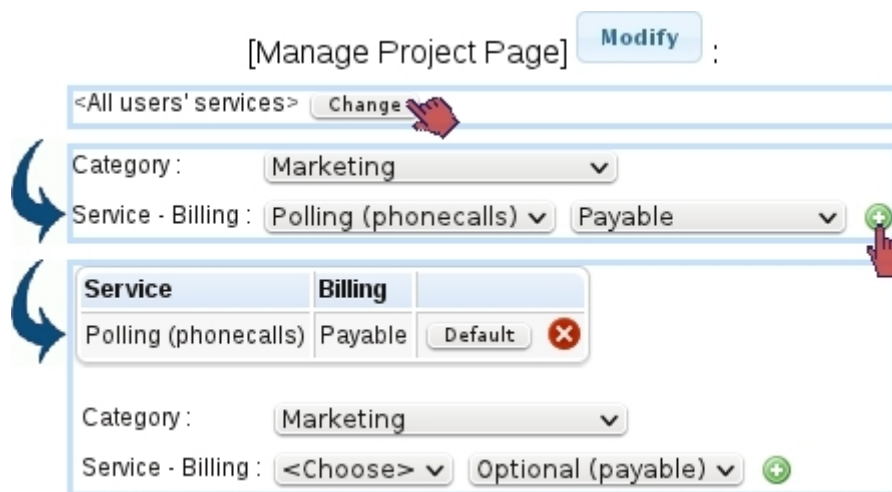


Figure 7.90: Adding a service article to be used for this project's timesheet.

As shown there, when no services are defined, user's own defined services (7.10.7) will be proposed. By clicking the **Change** button, shop articles used as 'services' can be added. Here, the article 'Polling (phonecalls)' (which price has been defined for an hour) will be proposed when adding a service timesheet (7.10.8.2), its billing forced to 'Yes' ; there, this service can be automatically selected by making it **Default**

The different billing options are :

- Free, meaning that service timesheets cannot be declared as billable ;
- Optional (free), meaning that service timesheets can be declared as billable or non-billable, with the latter chosen by default ;
- Optional (payable), meaning that service timesheets can be declared as billable or non-billable, with the former chosen by default ;
- Payable : meaning that service timesheets are no other way than billable.



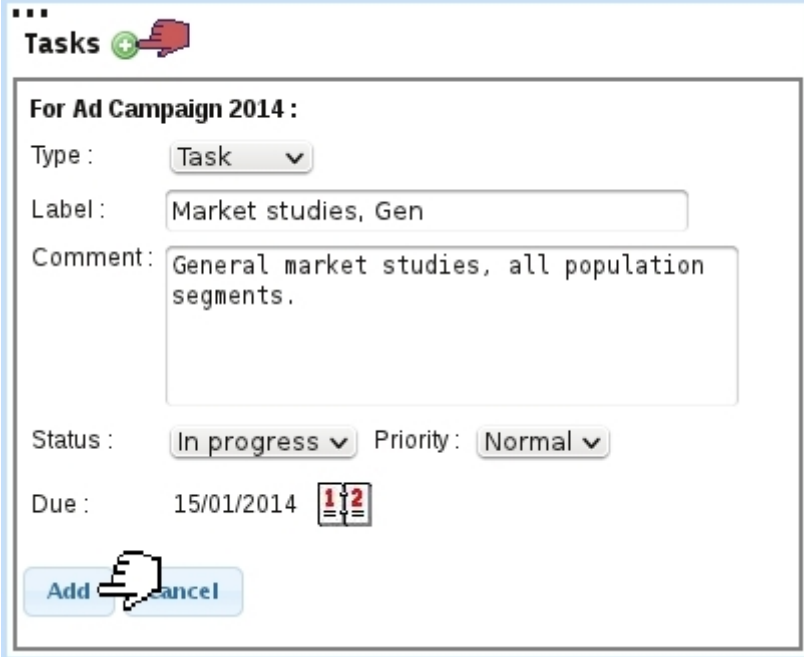
*The existence of such allowed services for a project override any service defined for a user (7.10.7). If a project has one or several defined services, only those will be proposed when adding a service timesheet.*


## 7.10.4 Project's tasks

A task for a project can be created from the *Manage Project Page*, or from the *Manage Tasks Page* (7.10.4.1).

Fig.7.91 shows how a task is added from a project.

[Manage Project Page] :



**Tasks** 

**For Ad Campaign 2014 :**

Type :

Label :

Comment :

Status :  Priority :


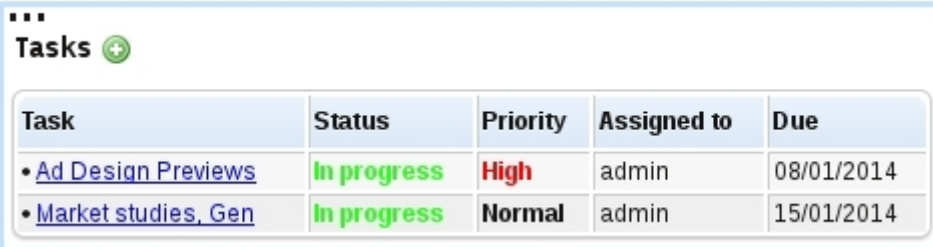
Due : 15/01/2014 

Figure 7.91: Adding a task for a project.

Tasks, on the Project's page, are featured in a table, each being a click-link to its *Manage Task Page* (7.10.4.1) :

[Manage Project Page] :



Task	Status	Priority	Assigned to	Due
<a href="#">• Ad Design Previews</a>	In progress	High	admin	08/01/2014
<a href="#">• Market studies, Gen</a>	In progress	Normal	admin	15/01/2014

### 7.10.4.1 Managing tasks

Clicking on the name of a task, wherever it appears, activates the Tasks tab to show the task's information, which can be updated (7.92).

**Market Studies, Gen :**

**Market studies, Gen** Ad Campaign 2014 ← Task list

Status : **In progress** – Priority : **Normal** – Assigned to : admin – Owner : admin – Due : 15/01/2014

---

**Modify**

Label :

Status :  Priority :

Due : 15/01/2014

Assign to :  Owner :

---

**Actions**  (  System actions)

07/01/2014 17:10 **First draft of results.**  
 admin  
 File : [results](#)

Figure 7.92: From here, a task can be managed.

Similarly as for a project, actions are logged and can be added, optionally with an attached file.

On this page, right to the task name, a click-link allows to show the task's related project, shown in the then-activated Projects tabs.

The  button allows to show the *Task List Page* as explained next.

#### 7.10.4.2 List of tasks

Accessed from an individual task or from the Tasks tabs when accessing the Projects/Timesheets add-on, the *Task List Page* (7.93) allows to look for tasks according to the following search criteria :

- user who owns tasks or to whom tasks have been assigned ;
- a range of dates for the due date ;
- a particular status.

#### 7.10.5 Project event control

In order to remind user of the tasks that are due, s/he can activate the "Projects/Timesheets" event control (1.3), which can show the following :

[Manage Task Page] [← Task list](#) :

or [Add-ons](#) / [Projects/Timesheets](#) / [Tasks](#) :

**Task list**

User :   – From 01/01/2014  to <none>

Status :  – Sort by :  –

Task	Project	Status	Priority	Assigned to	Due
<a href="#">Ad Design Previews</a>	<a href="#">Ad Campaign 2014</a>	In progress	High	admin	08/01/2014
<a href="#">Market studies, Gen</a>	<a href="#">Ad Campaign 2014</a>	In progress	Normal	admin	15/01/2014

Figure 7.93: An interface to look for tasks.

[Home](#) :

Projects ...
- □ ↗ ✕

Tasks in progress	Project	Due
<a href="#">Ad Design Previews</a>	<a href="#">Ad Campaign 2014</a>	08/01/2014
<a href="#">Market studies, Gen</a>	<a href="#">Ad Campaign 2014</a>	15/01/2014

## 7.10.6 Project planning

As accessed via the [Planning](#) tab, in order to better allocate users' time, Projects and users to process them can be planned in advance in a weekly view as featured in Fig.7.94. There, for each project and day of the selected week, the view shows which users are to work on which project.

In order to define a day's schedule for a project, one must click on the corresponding cell and add users (on that menu are only shown users having access to Projects/Timesheets and having been configured as 'will be featured in User menus', 7.10.1) :



**Planning**

View: **Project** **User** - Projects **Active** - Week: 06/01/2014 - 12/01/2014 **Display**

Project	Mon 6/1	Tue 7/1	Wed 8/1	Thu 9/1	Fri 10/1	Sat 11/1	Sun 12/1
<a href="#">Ad Campaign 2014</a>		Dick Harry Tom					

Figure 7.94: An example of project planning.

There, users are added with and removed with . Also, before validating, it is possible to duplicate the cell's planning for the next few days to come.

Afterward, a cell's planning can be modified in a similar way.

The 'View : Project/User' toggle on top of the page serves as to switch from this view to a view where *users* are listed vertically and, in each planning cell, *projects* (that are pending or in progress) will be featured ; the adding and deleting of projects for a day is done in the same way.

On the 'User:' menu there, it is to note that teams (7.10.7.1), if they have been defined, are also proposed.

### 7.10.7 Projects/Timesheets administration

Provided user's 'Bill management' rights (7.10.1) are set to 'Administration', the eponymous tab appears and shows what is featured at Fig.7.95.

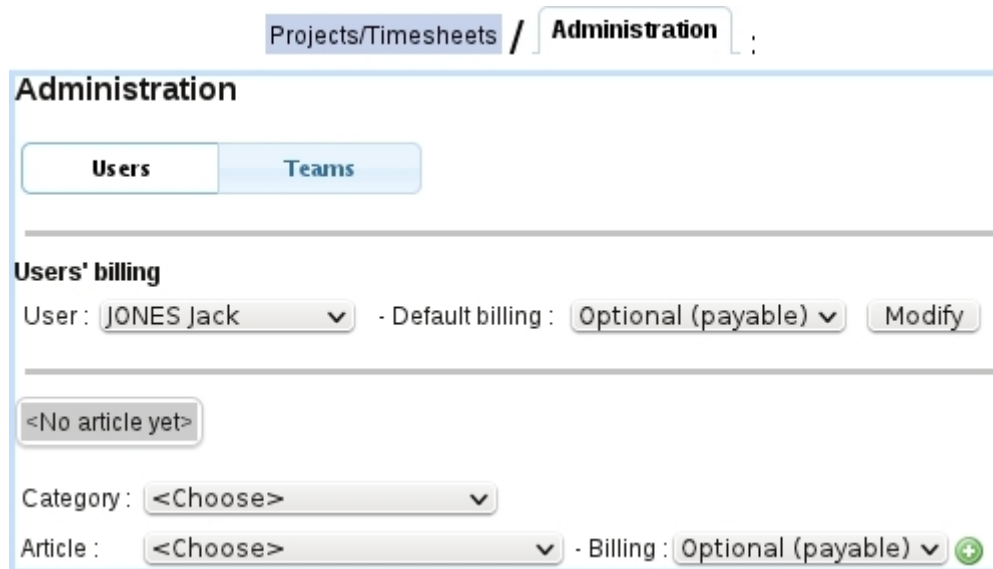


Figure 7.95: From here, users' billing preferences and services can be managed.

The first part defines the default billing when adding an service article is added in the interface just under it. This interface works similarly as in 7.10.3.5.

For instance, setting user Jack Jones has having the service article 'Airbrushing and enhancing' (as default) will mean that, **for projects without any service defined**, this service will be proposed when bringing up the add service interface.

#### 7.10.7.1 Teams of users

The 'User:' menus as seen on the timesheets or project planning (7.10.6) environment may also propose teams ; those are groups of users and are defined in the Human Resource Management add-on (7.11.4.9).


### 7.10.8 Managing Timesheets


Timesheets have the following properties :

- they can be either of the 'Service' or 'Article' kind ; in the former, for the project, a user performs a certain service for a certain timelength ; in the latter, an article from the shop is used for the project's needs (and thus does not have any user attached to it) ;

- therefore, in addition to the client, the project and (optionally) the user, a timesheet has either a duration or a quantity ;
- a comment is added too, describing what has been done.



Before properly using timesheets, a few configuration steps have to be performed, by defining allowed services for the projects (7.10.3.5) and/or users' services (7.10.7). **'Service' articles are created in the Shop as any other article**, except that the unit price must correspond to an hourly price.

The *Timesheet Page*, featured at Fig.7.96 is accessed either by the eponymous tab or by clicking the  button on the *Manage Project Page* (7.10.3.2). By default the *Timesheet Page* shows a 'Monthly View'.

[Manage Project Page]  :

**Online Timesheets**

User :  - Client :  - Project :

From : 30/5/2012  to : 30/5/2012 

---

*No timesheet*

---

---

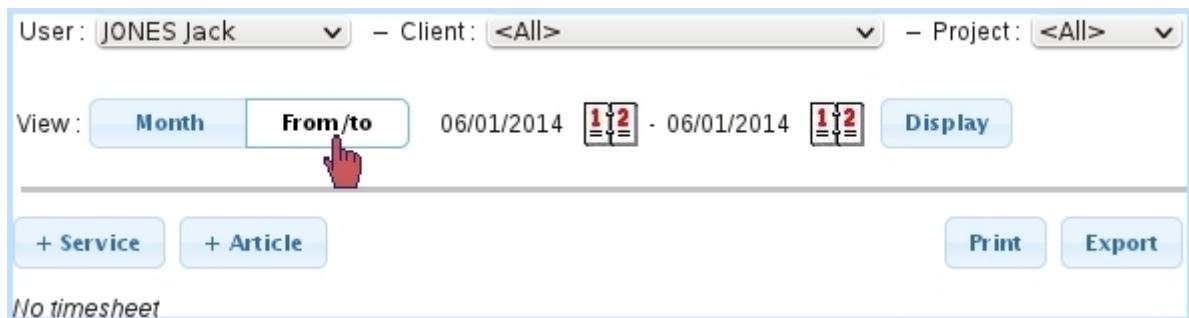
Figure 7.96: The *Timesheet Page*.

It features :

- a user menu, provided that user has at least 'View' rights for All's timesheets (7.10.1), otherwise it is just the name of the current user ; this user menu may also feature teams (7.10.7.1) ;
- client and project menus, that may be set to the originating project if coming from *Manage Project Page* ;
- a toggle between 'Month' and 'From/to' view ; the latter is where timesheets can be created (7.10.8.1) ;
- below those, according to the view choice a monthly or extended list of timesheets is shown, with buttons allowing to browse and others to print and export (7.10.8.5).

### 7.10.8.1 Creating timesheets

Adding timesheets is done by switching to the 'From/to' view, which then shows what the following :



The screenshot shows a user interface for creating timesheets. At the top, there are three dropdown menus: 'User: JONES Jack', 'Client: <All>', and 'Project: <All>'. Below these, there are two buttons: 'Month' and 'From/to', with a red hand cursor pointing to 'From/to'. To the right of these buttons are two date pickers showing '06/01/2014' and a 'Display' button. Below this section, there are two buttons: '+ Service' and '+ Article'. At the bottom right, there are 'Print' and 'Export' buttons. The text 'No timesheet' is displayed at the bottom left.


Two buttons **+ Service** and **+ Article** allow to create such timesheets, as described next. For these buttons to appear, user must have sufficient Timesheet rights.

Right to those, buttons allow to **Print** and **Export** timesheets (7.10.8.5).

### 7.10.8.2 Creating a service timesheet

Fig.7.97 shows how a 'service' timesheet is added.

[Timesheet Page, From/To View] **+ Service** :



The screenshot shows a dialog box for adding a service timesheet. It contains the following fields and options: 'Client: Marshall Justin', 'Project: Ad Campaign 2014', 'Date: 06/01/2014' with a repeat checkbox and dates 7/1/2014, 8/1/2014, 9/1/2014, and 10/1/2014. 'User: JONES Jack', 'Service: Polling (phonecalls)', 'Billable: Yes', and 'Duration: 6h30'. A 'Comment' field contains the text 'Poll was made on the 18-35 age range.' At the bottom, there are 'Add' and 'Cancel' buttons, with a hand cursor pointing to the 'Add' button.

Figure 7.97: Creating a service timesheet.


There :

- client, project and user are preselected from above ;


- date, as set by default to the current date, can be modified by clicking on the calendar icon. Timesheet can also be repeated the few next days ;
- service : if allowed services had been defined for the project (7.10.3.5), those are the ones that are shown in this menu. If project has no defined allowed service, user's services (7.10.7) are shown ;
- the 'Billable:' field contains either 'Yes' or 'No' or a menu with those, according to the billing of the service article chosen above ;
- finally a duration in hours (with half-hour increments) is picked and a comment is filled.

Upon click on **Add**, the service timesheet is created, and another one can be done right after ; the panel is dismissed with **Cancel**. Service timesheets feature in the following order the client, the date, the user (with the service article), the project and comment, and the duration :

Client	Date	User	Project	Duration
Marshall Justin	06/01/2014	admin <i>Polling (phonecalls)</i>	<b>Ad Campaign 2014:</b> Poll was made on the 18-35 age range.	6h30
<b>Total 06/01/2014</b>				<b>6h30</b>

When switching back to the Monthly View, a summary for Service timesheets is provided on each day line ; further details can be then viewed by putting mouse cursor over the  icon :

View: **Month** **From/to** :

January 2014		Duration	Clients
01	Wed	0h00	
02	Thu	0h00	
03	Fri	0h00	
04	Sat	0h00	
05	Sun	0h00	
	06	Mon	6h30 <b>Marshall Justin</b> [Ad Campaign 2014]

**Marshall Justin** Ad Campaign 2014

Jack Jones [Polling (phonecalls)] *Poll was made on the 18-35 age range.* (6:30)

Clicking on a day line in the Monthly View brings up the Range View with boundaries set to that day.



*It is to note that if neither project (7.10.3.5) nor user (7.10.7) were configured service-wise, a service timesheet can still be added, the service article being 'None' and the 'Billable:' property set to 'No'.*

**7.10.8.2.1 Creating a service timesheet for a team** By selecting a team (7.10.7.1) in the 'User:' menu, the 'User' field in the create service timesheet panel changes to a list featuring herself/himself and her/his teammates with checkboxes, pre-ticked according to whether user is selected by default in that team :

The screenshot shows a software interface for creating a service timesheet. At the top, a 'User/Team:' dropdown menu is open, showing a list of users and teams. The 'Writers' team is selected. Below the dropdown, there is a 'View:' field with 'M' and a '+ Service' button. The main form below shows 'Client: Marshall Justin', 'Project: Ad Campaign 2014', 'Date: 07/01/2014', and 'Users: [checked] HANSON Thomas - [checked] MALONE Richard - [checked] ROBBS Harry'.



*If project has no defined service : the available service article menu is ruled by the leader of the team and will be applied to each member of the team : the chosen article must then have been configured (7.10.7) before to each of them.*

Validating the timesheet will then automatically create an individual timesheet for each of the checked team members.

### 7.10.8.3 Creating an article timesheet

Contrary to the 'service' timesheets as described before, the article timesheets are not attached to a particular user. They describe which articles of the Shop have been used to do a certain task. Therefore, there is no duration anymore, only a quantity.

Fig.7.98 features the creation of such a timesheet. Final result shows client, date, article, project, comment and quantity.

[Timesheet Page, From/To View] + Article :

Client: Marshall Justin v

Project: Ad Campaign 2014 v

Date: 10/01/2014 1 2

Category: Advertisement material v

Article: Sheet 6ft by 4ft, glossy v quantity: 15 + -

Billable: Yes v

Comment: For pre-prints.

• Sheet 6ft by 4ft, glossy (15) ✕

Add Cancel

Figure 7.98: Creating an article timesheet.

Such timesheets, belonging to no user in particular, are always displayed on the Range View provided the date range, client and project are right. They are on the other hand not displayed on the Monthly View, as this view rather focuses on worked durations.

#### 7.10.8.4 Modifying timesheets

If user has sufficient Timesheet rights either for herself/himself or All, **and if the timesheet has not been invoiced yet**, service and article timesheets can have the following data changed, by clicking directly on the element :

- for both types : client, project, date and comment ;
- for service timesheets : user, service article, duration and (if applicable) billability ;
- for article timesheets : article, quantity and billability.

Validating changes is done through ✔. To cancel any change, ↶ must be clicked. If the rights are sufficient, timesheet can be deleted through ✕.

#### 7.10.8.5 Printing and exporting timesheets

The Print, Export buttons as available on the *Timesheet Page* (provided user has sufficient rights for 'Print/Export') respectively allow to produce PDF and CSV printouts of timesheets. Clicking on any of those leads to a page with various options.

For the 'Print' page, as featured at Fig.7.100, it is possible to :

Client	Date	Article	Project	Quantity
Marshall Justin	10/01/2014	Sheet 6ft by 4ft, glossy	Ad Campaign 2014 For pre-prints.	15
<b>Total 10/01/2014</b>				<b>15</b>

Figure 7.99: Modifying an article timesheet.

- display timesheets to print by a particular client (or for all), and narrow display by a particular project pertaining to her/him ; by default, client and projects are inherited from the menus on top of the page ;
- choose the format, whether each page will display one client or one project ;
- show the sub-totals by client or project : indeed, on the printout, the duration/quantity for each timesheet element is displayed and then these durations/quantities are summed up. Sub-totals by client and project are relevant when 'All' had been chosen for the 'Client:' and 'Project:' menus on the top of the page ;
- show timesheets issued by oneself, or by any or 'All' user(s) (in the latter cases, provided that user all sufficient "Print management" rights for 'All') ; a box can be ticked so as to show user name(s) next to each timesheet element. Teams can also be selected ; in which case, timesheets corresponding to users belonging to that team will be shown ;
- the start and end dates in between which timesheets will be displayed. Their default values depend on the current view, whether from 1 to the end of month for Monthly View or the chosen range for Range View ;
- show according to the billing status and the billability ;
- the writing paper on which timesheets will appear, created similarly as described in 13.2.

Here is an example of timesheet printout :



[Timesheet Page] [Print](#) :

Client :	Marshall Justin ▾
Project :	Ad Campaign 2014 ▾
Format :	1 client per page ▾
Subtotals :	by client ▾
User/Team :	Writers ▾
Display user :	<input checked="" type="checkbox"/>
Display details :	<input checked="" type="checkbox"/>
Display amounts :	<input checked="" type="checkbox"/>
From :	01/01/2014
To :	15/01/2014
Billable :	<All> ▾
Billed :	<All> ▾
Writing paper :	All-Purpose Mailing Template ▾
<a href="#">Print PDF</a> <a href="#">Close</a>	

Figure 7.100: Printing options.

<b>Marshall Justin</b>				
01/01/2014 - 15/01/2014				
Date	Ad Campaign 2014	User/Service	Duration	Price (VAT incl.)
06/01/2014	Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	6h30	650.00
07/01/2014	Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	7h15	725.00
<b>Total</b>	<b>Marshall Justin</b>		<b>13h45</b>	<b>1,375.00</b>

Date	Ad Campaign 2014	Article	Quantity	Price (VAT incl.)
10/01/2014	For pre-prints.	Sheet 6ft by 4ft, glossy	15	450.00
<b>Total</b>	<b>Marshall Justin</b>		<b>15</b>	<b>450.00</b>

The interface for the 'Export' is similar, except there are no format, billable and billed menus ; the output is a CSV file with the following fields featured, for service timesheets :

"Date";"User/Service";"Client";"Project";"Duration";"Comment";  
"Billable";"Billed";"Price"

and for article timesheets :

"Date";"Article";"Client";"Project";"Quantity";"Comment";"Billable";"Billed";"Price"

### 7.10.9 Invoicing timesheets

[Manage Project Page] **Invoices** :

#### Invoice timesheets

Client : Marshall Justin ▾

Project : Ad Campaign 2014 ▾

User : <All> ▾

From : 06/01/2014

To : 10/01/2014

Show pre-invoiced/invoiced :

Show non-billable :

Show

<input type="checkbox"/>	Ad Campaign 2014	User/Article	Date	Quantity
<input checked="" type="checkbox"/>	Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	06/01/2014	6:30:00
<input checked="" type="checkbox"/>	Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	07/01/2014	7:15:00
<input checked="" type="checkbox"/>	For pre-prints.	Sheet 6ft by 4ft, glossy	10/01/2014	15

Invoice selected

Figure 7.101: The *Invoice Timesheet Page* : choosing the timesheets to invoice.

The great strength of Blue Chameleon is that it allows timesheets that are billable to be invoiced directly, without going through the shop.

The page to invoice timesheets can be accessed either by the **Invoices** tab or by the **Invoices** button as found on the *Manage Project Page* (7.10.3.2). The latter will more practically pre-load the menus and calendars (client, project, user and range of date) as

seen on Fig.7.101. A checkbox also allows to show the timesheets that had been invoiced and an other one to show those which cannot be billed (which can be useful to retrieve a non-billable timesheet that had been labeled so by mistake).

Timesheets (of whichever type, article or service - for the latter, depending on the chosen user) corresponding to the search criteria are shown, with their general data (project, user/article, date, quantity/duration) and for each a checkbox that allows to select it for pre-invoicing.

### 7.10.9.1 Pre-invoicing

Clicking on the **Invoice selected** button as seen on the *Invoice Timesheet Page* leads to a page as featured on 7.102, where :

- quantities/durations can be adjusted, if needed (any change in those will be affect the corresponding timesheets) ;
- if article's ordering options (3.3.1.3) allow to, label, unit price or both can be modified.

**Invoice selected** :

**Invoice timesheets [Ad Campaign 2014]**

<b>Value date :</b> 15/01/2014	<b>Username:</b> <a href="#">jstn.mrsh73</a>
<b>Posting date :</b> 15/01/2014	<b>Title:</b> Mr
	<b>Name:</b> Marshall Justin
	<b>Address:</b> Prism Avenue 59100 Billings USA
	<b>Status:</b> Ok

Label:

Article	Quantity	Price	Total price	VAT
Polling (phonecalls)	6h30 ▾	100.00	650.00	5.00 %
Polling (phonecalls)	7h15 ▾	100.00	725.00	5.00 %
Sheet 6ft by 4ft, glossy	15	30.00	450.00	5.00 %
<b>Total VAT incl.</b>			<b>1,825.00</b>	
<b>Total VAT excl.</b>			<b>1,738.10</b>	
<b>Total VAT</b>			<b>86.90</b>	

Figure 7.102: From here, quantities/durations and labels may be updated.

Any change has to be **Update**'d. Clicking on **Pre-invoice** leads to the *Pre-invoice Page*, (Fig.7.103) where :

- all timesheets featuring the same article or service **are summed in a single line, with the quantities/durations summed up** : here, the two lines with the service article 'Polling (phonecalls)', one timed at 6:30 hours and the other at 7:15 hours are merged into a single 'Polling (phonecalls)' line timed at 13:45 hours ;
- also, if article's ordering options (3.3.1.3) allow to, label, unit price and summed-up can quantities/durations be modified ;
- new lines can be **Add**'ed ;
- pre-invoice can be saved as a draft (necessary before creating the invoice itself).

The pre-invoice can be accessed later on : the *Invoice Timesheet Page* will feature, for each pre-invoiced timesheet, a click-link (e.g. [Pre-invoice #205](#) that allows to access directly the pre-invoice page.

Pre-invoice / Save as draft :

### Pre-invoice #205 [Ad Campaign 2014]

<b>Value date :</b> 15/01/2014 <b>Posting date :</b> 15/01/2014	<b>Username:</b> <a href="#">jstn.mrsh73</a> <b>Title:</b> Mr <b>Name:</b> Marshall Justi <b>Address:</b> Prism Avenue 59100 Billings USA <b>Status:</b> Ok
--	---

Label:

Article	Quantity	Price	Total price	VAT	
Polling (phonecalls)	13 hours 45 minutes	100.00	1,375.00	5.00 %	
Sheet 6ft by 4ft, glossy	15	30.00	450.00	5.00 %	
<b>Total VAT incl.</b>			<b>1,825.00</b>		
<b>Total VAT excl.</b>			<b>1,738.09</b>		
<b>Total VAT</b>			<b>86.91</b>		

---

Figure 7.103: The pre-invoice, just after it saved as a draft.

### 7.10.9.2 Finally creating the invoice

Once all changes have been done to the pre-invoice (and they can be done and saved all along the project's life), the invoice can finally be created by clicking [Generate invoice](#).

As a result, the *Invoice Timesheet Page* is shown back, with now for each invoiced timesheet a reference to the created invoice. It should be noted that, for 'service' articles, the quantity (which can only be an integer) is given as minutes, the (unit) 'Price' being the hourly rate :

Ad Campaign 2014	User/Article	Date	Quantity	Invoice
Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	06/01/2014	6:30:00	<a href="#">201401150100000191</a> <a href="#">Details</a>
Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	07/01/2014	7:15:00	<a href="#">201401150100000191</a> <a href="#">Details</a>
For pre-prints.	Sheet 6ft by 4ft, glossy	10/01/2014	15	<a href="#">201401150100000191</a> <a href="#">Details</a>

### 7.10.9.3 Details on invoiced timesheets

When several timesheets are selected for invoicing, a few of them may correspond to the same article, for instance a 'service' article performed at several dates. In order to make the final invoice as succinct as possible, **those identical articles are condensed in a single line : their quantities or duration as well as their total prices are be summed up**, provided there was no change in label or unit price.

It is still then possible to get the full details of a series of invoiced timesheets, through the [Details](#) button as found right to the invoice reference.

On subsequent page, full details about the invoiced timesheets are shown, but most interestingly, it is possible to [Print](#) those details, giving a result rather similar to the timesheet PDF printout (7.10.8.5).

This way, if a series of timesheets had the same articles repeated a few times (for instance the same service performed at different dates or by different users), **this printout, giving the full details of what has been done, completes nicely the invoice printout, which is condensed.**

[201401150100000191](#) [Details](#) :

### Invoice details

Reference : [201401150100000191](#)

Client : Marshall Justin

Date : 15/01/2014

Date	Ad Campaign 2014		Duration/Qty	Price (VAT incl.)
06/01/2014	Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	6:30:00	650.00
07/01/2014	Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	7:15:00	725.00
10/01/2014	For pre-prints.	Sheet 6ft by 4ft, glossy	15	450.00
<b>TOTAL (VAT incl.)</b>				<b>1,825.00</b>

Display user  Display details

[Print PDF](#)

Figure 7.104: Full details of a series of invoiced timesheet, which can be printed out.

## 7.11 Human Resource Manager (HRM)

Blue Chameleon's Agenda, as previously seen (7.2), offered a client-dedicated organization of your company's working force. Now, employees also have their own timetable-related plans, rights and duties that should be taken care of ; that is why Blue Chameleon's is equipped with a Human Resource Manager that allows to :

- manage employees along their working schedule (regular weeks, on weekends...) and work contract (permanent, temporary...) ;
- as an employee, plan holidays, modify them... in a quantitative way ;
- manage employees' requested holidays in a chain-of-command manner ;
- see at a glance, through the Planning, what each user or user groups are up to, sick leave, work or holidays.

The HRM functionalities are accessed via the eponymous submenu element in the

**Add-ons**

command group.

### 7.11.1 HRM setup guide

This guideline has to be followed before using HRM and, after that, each time a new user is in.

1. set up HRM user rights (7.11.2) ;
2. define workweek profiles (7.11.4.1) ;
3. configure employees (7.11.4.3) : to each user, assess a workweek profile as well as entry/outgo dates so that her/his Planning is filled by default.

### 7.11.2 Rights related to the Human Resource Manager

They are ruled at the *Modify User Page* (9.17) for instance as illustrated on Fig.7.105.

For this user :

[*Menu script user rights* :]

- HRM : rules the access to the HRM add-on

The other rights as displayed under [*HR Management*] rule the management (reading, creating, modifying and deleting) of HRM's components. They might be for 'Owner' (the right is limited to user herself/himself), 'Group' (the right is extended to all users in user's default user group) 'All' (user can apply it to any other user) :

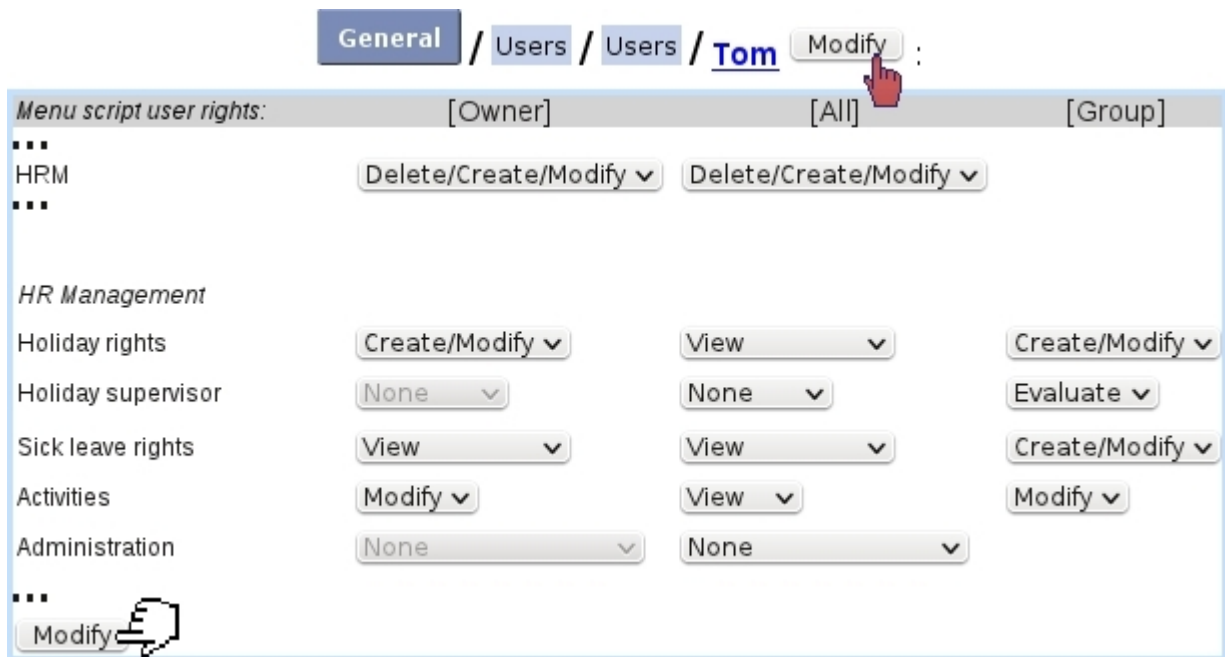


Figure 7.105: The user rights that rule Human Resource Manager ; **these values are ideal for a non-manager user that is a head of group** (he can indeed plan holidays, sick leaves and activities for users belonging to his group).


- Holiday rights ('Owner', 'Group', 'All') : are related to user's ability to her/his own (and others') holiday. Values are :
  - None : no access to holiday planning ;
  - View : the holiday planning can only be viewed ;
  - Create/Modify : user can add (7.11.5.2) and modify (7.11.5.4) holidays for herself/himself (in addition, her/his group or all users) and also cancel requests (7.11.5.4.2) for unconfirmed holidays ;
  - Credit/Debit : user can credit and debit holidays (7.11.5.9) ;
  - Review : user can review holidays requests (7.11.5.7). With this particular right, user can also modify and cancel holidays that have already been confirmed.
- Holiday supervisor ('Group', 'All') : gives user the right to give an opinion on a holiday request (7.11.5.8) ;
- Sick leave rights ('Owner', 'Group', 'All') : are related to user's ability to sick leaves (7.11.9). Values are :
  - None : user cannot see her/his own or others' sick leaves ;
  - View : user's own sick leaves or others' can be seen on the planning ;
  - Create/Modify : user can add and modify sick leaves for herself/himself ('Owner') and others ('Group', 'All').



- Activities ('Owner', 'Group', 'All') : user can modify activities, on the planning (7.11.10) for herself/himself or other users ; this also grants the right to overtime management (7.11.6) and on-planning week/day type change (7.11.7).
- Planning administration ('All') :
  - None : the 'Administration' button, at the bottom of the *Main Planning Page*, does not even show ;
  - Workweek profiles : user can define and delete (7.11.4.1) ;
  - Yearly management : user can default-fill planning for any year (7.11.4.5).


### 7.11.3 Planning view

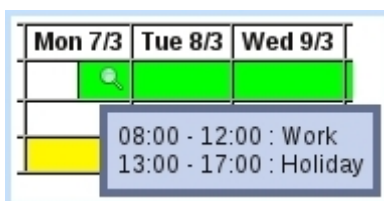
As featured on Fig.7.106, the planning is accessed via **HRM**. The following display options are featured :

- search menus to aim on a particular user group and/or user, as well as ('User status') according to their Blue Chameleon access (9.4.3) status : enabled, disabled or any of those ;
- browsing calendars , allowing to then **Display** the planning from and to any date ;
- a checkbox enabling to show holidays that have not been validated yet.

Upon display, thanks to click-links, the planning can also be browsed in a weekly or monthly way. User names are also clickable, showing user's information (7.11.3.1).

On the planning grid, a cell which is fully colored means that this event lasts for the user's whole day (therefore, with a duration equal to user's *Daily Work Duration*, as weekly set on the *Staff Workdays Page*, 7.11.4.4), otherwise the number of hours that the event lasts is shown in a proportional way to the cell's width.

Hovering mouse cursor over a cell shows a  icon, which mouseover shows in a small window the detailed planning contents of the day :



Color codes for cells (or cell parts), as well as the effect of clicking on them, are as follows :

**Planning**

User group :  User :  User status :

From 7/3/2011  to 13/3/2011  -  Show pending holidays

---

**Planning group Sales Department, 7 March 2011 - 13 March 2011 :**

<< February <	User	Mon 7/3	Tue 8/3	Wed 9/3	Thu 10/3	Fri 11/3	Sat 12/3	Sun 13/3	> April >>
	HANSON Thomas ...								
	MALONE Richard ...				Biz trip	Biz trip			
	ROBBS Harry ...								

Print model :

Figure 7.106: The *Main Planning Page*, showing the planning of all users (with an *enabled* access) in "Sales Department" user group.


Color	Meaning	Click (*)
white	work	Manage Day pop-up (7.11.3.2)
red	no work	<i>Add/Modify Workday Page</i> (7.11.6)
green	confirmed holidays	<i>View Holidays Page</i> (7.11.5.3), ( <i>Modify Holidays Page</i> (7.11.5.4) if 'Review' rights)
orange	pending holidays	<i>Modify Holidays Page</i> (7.11.5.4)
yellow	sick leave	<i>Modify Planning Page</i> (7.11.9.1)

(\*) *provided that related user rights are sufficient.*

As it can be seen on the illustration, a white planning cell may contain a small text, corresponding to an activity (7.11.10) set for that user that day.

Below the planning grid, as many as four buttons may be available, according to user's rights (7.11.2) :

- , leading to the eponymous page as detailed at 7.11.5.1 ;
- , leading to the *View Activities Page* (7.11.10) ;
- , allowing to access the *Manage Users' Holidays Page* (7.11.5.6) ; this button only appears if "Holiday rights" are at least set to 'Debit/Credit' ;
- , allowing to access the *Planning Administration Page* (7.11.4) ; this button only appears if "Administration rights" are at least set to 'Workweek profiles'.

At the very bottom of *Main Planning Page*, a button is available to  as a formatted PDF document the current view of the planning (limited to one week), according to a print model (13.2).



*It is to note that, in order to not clutter the display, only users who had been assessed a workweek profile (7.11.4.4) appear here.*

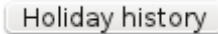
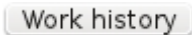
### 7.11.3.1 The User Information pop-up

[Main Planning Page] [HANSON Thomas](#) :



Figure 7.107: The User Information pop-up.

On the *Main Planning Page*, clicking on a user's name shows the pop-up as featured in Fig.7.107, where the following is available :

- the user's general information (names, user groups, phone numbers,...) as it was filled on the *Modify User Page* (9.17) ;
- a button allowing to view user's  (7.11.5.5) ;
- a button allowing to view user's  (7.11.8) ;
- same possibility as above for user's sick leave (7.11.9) history.

The clickable "..." right next to a user name leads to a page where a detailed planning (similar as the one featured at Fig.7.125) for this user can be seen.

### 7.11.3.2 The Manage Day pop-up

On the Planning view, whenever a cell (or part thereof) is white, clicking on it brings (if at least one of the two elements proposed in the menu is allowed by rights) the Manage Day pop-up as featured on Fig.7.11.3.2. According to the user's rights (7.11.2), and depending how current user is related to the clicked cell's user, these elements may or may not appear :

- the clicked day's activities (7.11.10) can be changed ; for this to appear, user has to be configured activity-wise (7.11.4.4) and the user right for 'Activity' has to be high enough for 'Owner', 'Group' or 'All', depending on the clicked user ; it is to note that as many activity choices appear as user's day is configured work-wise (for instance, work from 8-12, nothing from 12 to 1PM and work again from 1PM to 5PM : yields two activity choices) ;
- the daily planning/weekly planning corresponding related to this day can be changed (7.11.4.2/7.11.7) ; this also relies on the 'Activities' user right ;
- an event can be added :
  - new holidays (7.11.5.2), relying on the eponymous user right ;
  - overtime or undertime (7.11.6), relying on the 'Activities' user right ;
  - sick leave (7.11.9), relying on the eponymous user right.



Figure 7.108: The Manage Day pop-up for user Tom.

The **More...** buttons as seen in this pop-up allow to configure more precisely or broadly :

- for Activity, it brings the pop-up as seen in Fig.7.139, where the activities for the week (or the month) can be set ;
- for Daily planning, it brings up similar detailed schedule menus as in Fig.7.134 allowing to define a more complicated schedule ;
- for Weekly planning, it leads the same page as in Fig.7.115, where weekly profiles can be set for the whole year.

For holidays or sick leaves, on the subsequent page, a range of dates for the new event will be proposed, starting and ending by default on the clicked date. For overtime, a configuration page the day is brought up.

## 7.11.4 Planning Administration

Configuring the planning user-wise is done from the *Planning Administration Page* as illustrated on Fig.7.109, accessible only if "Administration" user rights (7.11.2) are sufficient, i.e. at least set to 'Workweek profiles'.

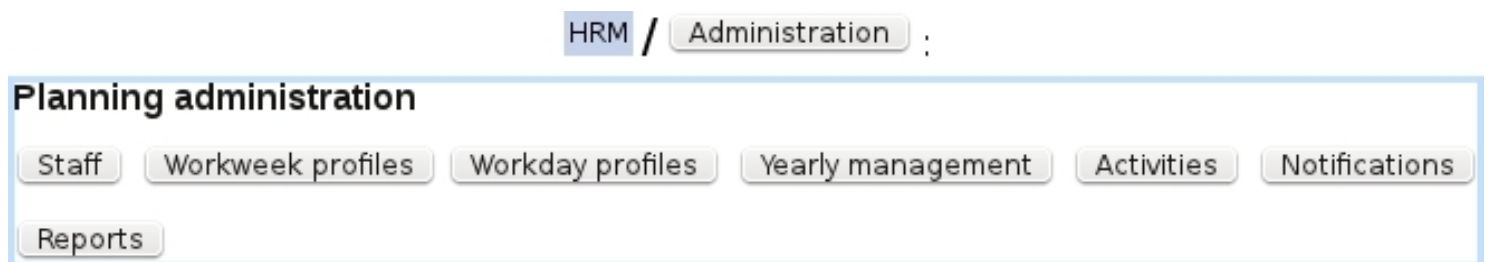


Figure 7.109: The *Planning Administration Page*.

On this page :

- **Staff** leads to the *Manage Staff Page* (7.11.4.3), where employees are configured (entry/exit dates, workweek profiles) ;
- **Workweek profiles** leads to the page as described next where workweek profiles are created ;
- **Yearly management** leads to the page where the yearly filling of planning (7.11.4.5) is taken care of ;
- **Activities** leads to the page where activities are configured (7.11.4.6) ;
- **Notifications** leads to the page where notifications are set up (7.11.4.7) ;
- **Reports** leads to a page where time-wise reports upon employees' sick leaves, holidays... can be printed out (7.11.4.8).

**When first using HRM, defining workweek profiles and configuring employees as described next must be done in order.**

### 7.11.4.1 Defining workweek profiles

Inside a company, employees might not share the same weekly schedule and total worked hours ; that is why Blue Chameleon enables to define workweek profiles, describing for each day of the week which hours are worked and which are not.

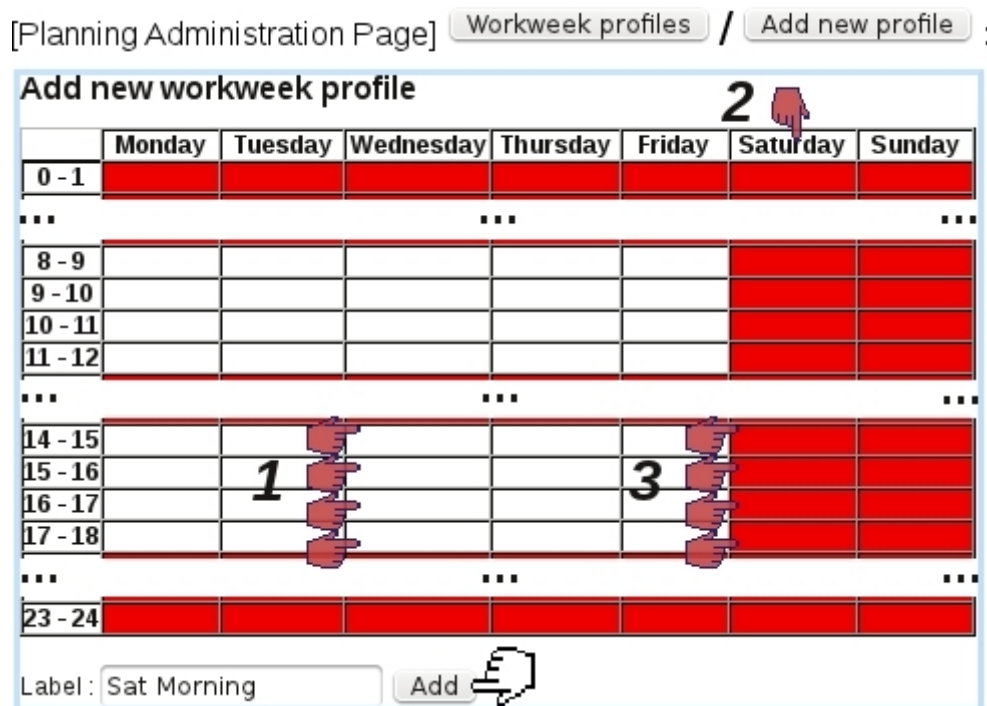


Figure 7.110: Creating a workweek profile with a Wednesday afternoon off and a worked Saturday morning. First, the four hours of Wednesday afternoon are clicked to be declared as un-worked ; then, **Saturday** is clicked to be declared as worked and finally the four hours of Saturday afternoon (now in white) are clicked to be declared as un-worked.

Defining such profiles is achieved from the *Planning Administration Page*, via the [Workweek profiles](#) / [Add new profile](#) . A general weekly schedule, as featured on Fig.7.110 is then displayed.

There :

- clicking on a particular cell declares this hour either worked or un-worked ;
- clicking on a day's name makes it either fully un-worked or worked similarly as the other days ;
- clicking on a hourly range (for instance **8-9**) declares it either worked or un-worked for all worked days of the week.

The default workweek profile is defined from Monday to Friday, from 8 to 12 and from 14 to 18.

**View workweek profile**

Label : Sat Morning

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
0 - 1							
...							
8 - 9							
9 - 10							
10 - 11							
11 - 12							
...							
14 - 15							
15 - 16							
16 - 17							
17 - 18							
...							
23 - 24							

Figure 7.111: Viewing the workweek profile as previously created.

Any profile can then be seen (as illustrated as a result on Fig.7.111) via [Workweek profiles](#), as well as modified (in a similar way as defined) and removed.

#### 7.11.4.2 Defining workday profiles

Workday profiles can be designed to be used whenever a specific day's planning has to be modified ; they then appear in a specific menu (as seen for instance at Fig.7.134 or at the Manage Day Popup, 7.11.3.2) and allow thus to load in a single click a day's profile.

They are defined from the *Planning Administration Page*, through [Add new day profile](#) ; on subsequent popup, as featured at Fig.7.112, hourly ranges are defined by clicking on the 🕒 icons for start and end and are [Add](#)'ed. The day profile is then created.

Afterwards, workday profiles can be modified and deleted (provided that they are not already used in the planning).

#### 7.11.4.3 The *Manage Staff Page*

As illustrated in Fig.7.113, this page features, for users (as usual searchable by user groups, access status (9.4.3) and user type (9.17)) :

- her/his **current** workweek profile (7.11.4.1), as assessed as described at 7.11.4.4.1 ;
- her/his allowed holiday overdraft i.e. the number of vacation days that can be taken eventhough user has none remaining (provided of course they will be compensated for in the future) ;

[Planning Administration Page] Workday profiles / Add new day profile :

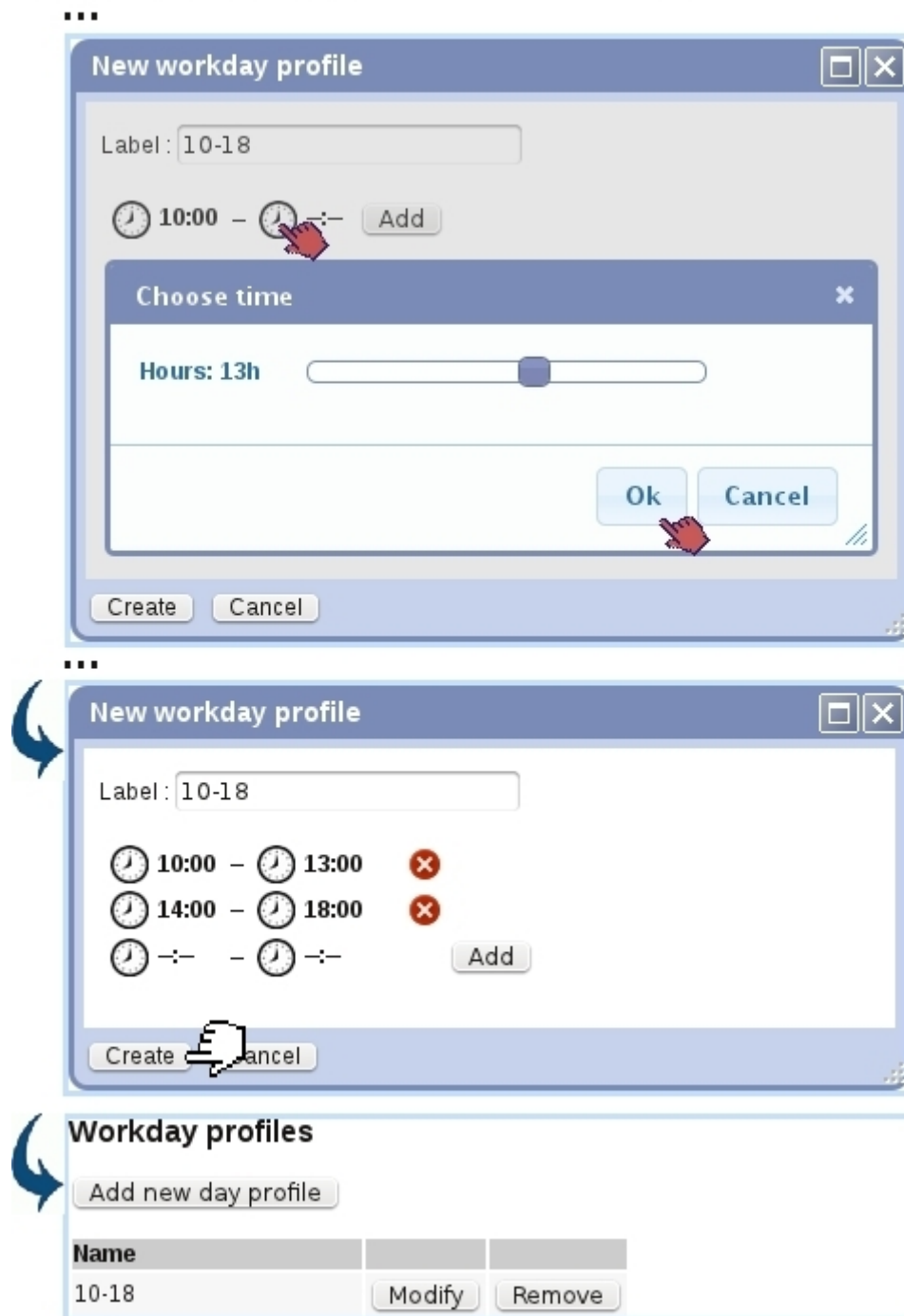


Figure 7.112: Creating a workday profile, defining a day worked from 10AM to 1PM and 2PM to 6PM.

- their entry and exit dates in the company ; users can be filtered entry and exit date-wise thanks to four calendars at the page ;
- buttons allowing to **View** and **Modify** this particular user.



**Staff**


User group :  User :  User status :  User type :

Entry : from  to  · exit : from  to

User	Current workweek profile	Default workweek profile	Holiday overdraft	Entry	Exit	
HANSON Thomas	Regular	<None>	2	02/01/2004	-	<input type="button" value="View"/> <input type="button" value="Modify"/>
MALONE Richard	Regular	<None>	2	04/12/2005	-	<input type="button" value="View"/> <input type="button" value="Modify"/>
ROBBS Harry	Sat Morning	<None>	2	02/10/2006	31/12/2012	<input type="button" value="View"/> <input type="button" value="Modify"/>

Figure 7.113: The *Manage Staff Page*, offering extensive data on Blue Chameleon users relating to the Planning.

The latter button leads to a page where workweek profile, holiday overdraft and entry/exit dates are to be configured. It is explained next.

 *It is to note that, contrary to the Main Planning Page (Fig.7.106), users with no assessed workweek profile are shown here, as the Manage Staff Page's main aim is to configure users in that regard.*

#### 7.11.4.4 Configuring an employee

Fig.7.114 shows the data that can be individually configured for each employee. Apart from a menu allowing to set an allowed holiday overdraft in days, a button allows to configure the  of assessed workweek profiles on a dedicated page, detailed further down.

Those configuring operations have to be done before using HRM.

Two calendars allow to define entry and exit dates of user in the company :

[Manage Staff Page] HANSON Thomas (...)

### Modify employee profile

User : **Thomas HANSON**[Sales Department]

Current workweek profile : Regular


Default workweek profile : Regular

Hol. overdraft (days) : 2

Entry date : 2/1/2004

Exit date : <none>

Category : Salesmen



---

Figure 7.114: The *Manage Employee Page* : human-resource data of a user inside Blue Chameleon.

2/1/2004  

2/1/2004 

Jan 2004

Su	Mo	Tu	We	Th	Fr	Sa
				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

If employee is a permanent one, then setting exit date to 'None' (or any date for that matter) is done by clicking on the  button in this calendar. This no-date option is also in force on the search calendars of the *Manage Staff Page*. If a date was selected by mistake in the calendar, it can be re-initialized to its former value by clicking the  button.

If nothing is configured for the user yet, it is to note that, when validating changes via **Modify**, the default planning for this user is filled according to the **default workweek profile** (which must be defined in any case) and entry/exit dates. If for instance no entry date is defined, planning is filled beginning at the start of the current year ; if no exit date is defined, planning is filled until the end of the current year.

For more complex plannings, the **Details** of user's set workweek profiles can be configured, as explained next.

Lastly, the 'Category :' field shows the activity categories (7.11.4.6.1) that have been defined and allows to assess one to this employee.

**7.11.4.4.1 Configuring workweek profiles** As Fig.7.115 shows, on the upper part of the page, a workweek profile is chosen in a menu, along with a date from which it starts : validating this with the **Apply** button will fill/reformat the planning for this user with that workweek profile from this date on (always automatically set to be a Monday).

[Manage Staff Page] HANSON Thomas (...) **Modify** / **Details** :

**Weekly schedule details**

User : **Thomas HANSON**[Sales Department]

Current workweek profile : **Regular**

Apply :  starting :

---

Year :

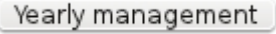
Week	Workweek profile
02/01/2012 - 08/01/2012	<input type="text" value="Regular"/>
09/01/2012 - 15/01/2012	<input type="text" value="Regular"/>
...	...
24/12/2012 - 30/12/2012	<input type="text" value="Regular"/>
31/12/2012 - 06/01/2013	<input type="text" value="Regular"/>

Figure 7.115: Two ways by which to configure the weekly schedules of an employee.

For users that may have a more complicated schedules, i.e. weekly schedules subjected to change along time, the lower part of the interface allows, *for each week of the current year*, to choose one specific workweek profile ; any change done that way is validated

through the  button at the bottom of the page.

#### 7.11.4.5 Yearly management

When the end of the year comes - or even anytime in the year, it is necessary to fill in plannings by default for the next year : this is done as shown on Fig.7.116 via the  as found on the *Planning Administration Page*.

This page (endowed with the usual user-related search menus) indicates for each user until which date the planning is filled, and also warns if a user has no workweek type assessed to her/him, in which case user has to be configured as shown at 7.11.4.4.

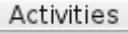


*The process of filling plannings for the next year, covering all employees, may take some time for the server to complete.*



*It is to remember that, before filling the plannings by default, the workweek profiles for the next year can be modified thanks to the interface as seen in Fig.7.115 ; otherwise, filling is done according to the workweek profile in force at the last week of the current year.*

#### 7.11.4.6 Configuring activities

Before starting using activities (7.11.10) in the planning, it is of course necessary to define them first, a task which is done through the  button as seen on the *Planning Administration Page* (Fig.7.109).

To make their assessment to users easier, activities are gathered in **categories**.

**7.11.4.6.1 Activity categories** Fig.7.117 shows how an activity category is defined, consisting only in a name.

Afterwards, an activity category is assessed to an employee on her/his *Manage Employee Page* (Fig.7.114).

Categories can be modified name-wise or removed (if they do not contain any activity) with the eponymous buttons.

**7.11.4.6.2 Defining activities** With activity categories defined as shown above, activities themselves are defined as featured at Fig.7.118.

The short label is featured whenever display is under size constraints, e.g. when there are two activities in the same day or when activity is not the only thing in the planning

[Planning Administration Page] Yearly management :

**Yearly management**

User group : <All> User : <All>  
User status : Enabled User type : merchant company Search

User	Planning filled until
HANSON Thomas	31/12/2012
JONES Jack	31/12/2012
KOVÁCS Jane	31/12/2012
LAVEREAU Dwayne	06/06/2012
MALONE Richard	31/12/2012
ROBBS Harry	31/12/2012
RUSSELL Mary	31/12/2012
SAWYER James	31/12/2012
WINSTON Karen	31/12/2012
ZMUDA Robert	No workweek type ! Planning not filled !

Fill planning for 2013 :

User	Planning filled until
HANSON Thomas	31/12/2013
JONES Jack	31/12/2013
KOVÁCS Jane	31/12/2013
LAVEREAU Dwayne	06/06/2012
MALONE Richard	31/12/2013
ROBBS Harry	31/12/2012
RUSSELL Mary	31/12/2013
SAWYER James	31/12/2013
WINSTON Karen	31/12/2013
ZMUDA Robert	No workweek type ! Planning not filled !

Figure 7.116: Filling the plannings by default for year 2013 ; it is to note that the fill does not affect temporary employees (whose exit date is within the current year) and unconfigured employees (respectively Dwayne Lavereau and Robert Zmuda in this example).

cell.

After their definition, activities' names can be modified or their categories changed ; they can be removed provided that they have not been yet used in the planning.

#### 7.11.4.7 Holiday notifications

Whenever a user creates a new holiday request (7.11.5.2), another user (for instance the leader of her/his group) can receive an email notification of it, and, if rights are sufficient, can give an opinion on this request (7.11.5.8) before it is reviewed.

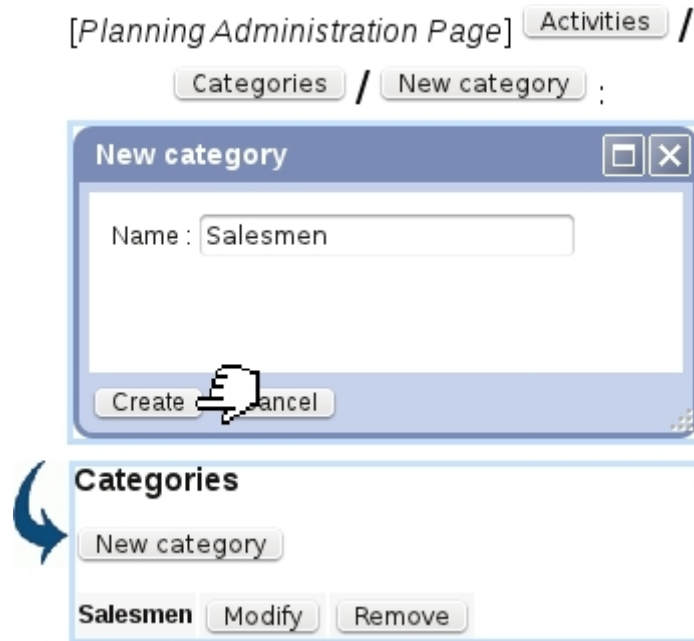


Figure 7.117: Defining a new activity category 'Salesmen'.

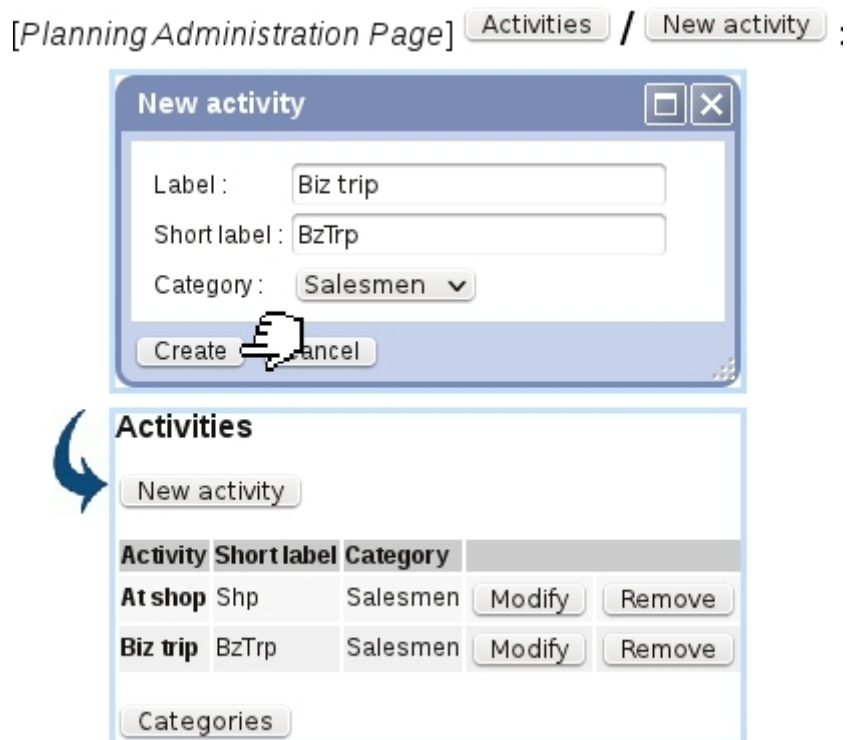


Figure 7.118: Defining an activity 'Biz trip', related to category Salesmen.

Those notifications are sent automatically to whomever has been set as the recipient(s).

As described on Fig.7.119, through the **Notifications** as found on the *Planning Ad-*

*ministration Page* (7.11.4), a list of users is found, with for each which user(s) will be notified of the request and confirmation, as also an email can be sent when holiday is confirmed or refused.

On this configuration page, one or several users can be set as receiving the holiday request notifications and/or confirmations.

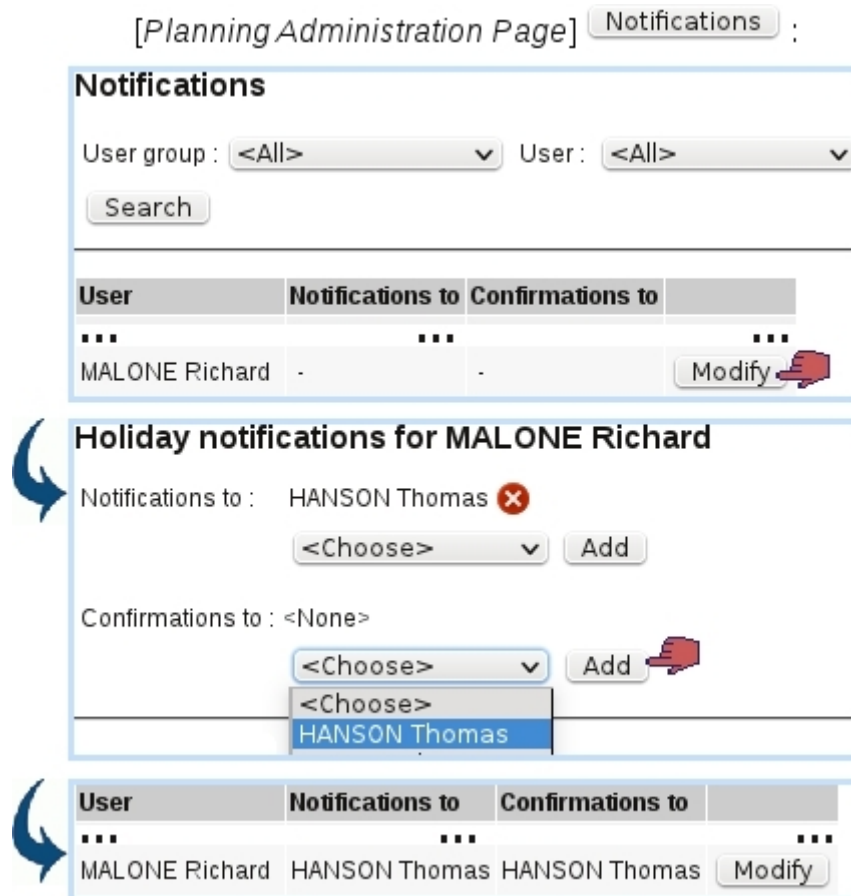


Figure 7.119: User Thomas is set as the receiver of Richard’s holiday request notifications and confirmations.

#### 7.11.4.8 HRM reports

As illustrated below, this functionality allows managers to display, for a custom range of dates, the number of days/hours for each kind of occupation (normal work, overtime, holidays, sick leaves) ; a specific user group can be chosen.

Thanks to the eponymous button, a PDF version of the search results can be printed out along a print model.

#### 7.11.4.9 User teams

Teams aim at grouping users which perform tasks together ; they may used to define what is done on a planning cell, similarly as for activities (7.11.10).

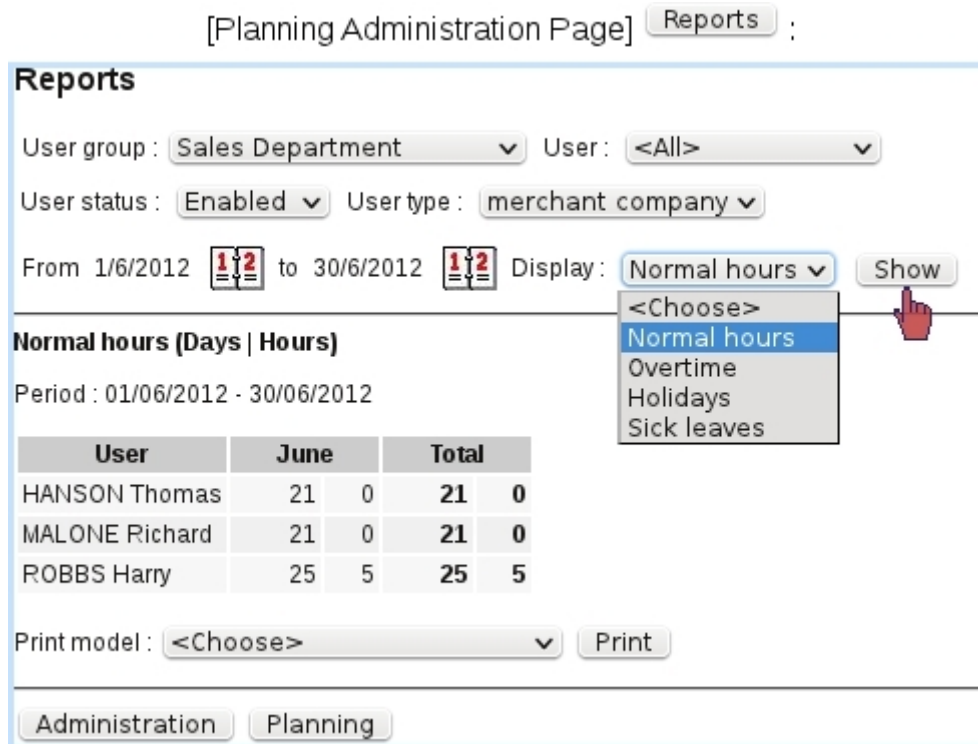


Figure 7.120: Days and hours as worked by the Sales Department for June 2012.

As shown on Fig.7.121, a team is defined with the following data :

- a name and short name ;
- optionally, an activity category (7.11.4.6.1) to restrict team to only users belonging to that category ;
- whether this team is visible in Activities/Teams menus ;
- whether this team is accessible (i.e. can be assessed) to users that do not belong to it ;
- a menu with users (that may only show a subset of users if the 'Category:' menu further up has been set to other than 'None'), each of them added by + and removed by ×. They may be 'selected by default' and one user is defined as leader ; those concepts are relevant in the Projects/Timesheets add-on when adding a Timesheet for a team (7.10.8.2.1).

After, teams' data (members, leaders, visibility...) can be viewed at a glance ; they can also be modified or deleted (provided they are not used in the planning yet) :



[Planning Administration Page] Teams / Add team :

**New team** □ ✕

Name :

Short name :

Category :

Visible :

Accessibility : Open

Teammates :

User	Selected by default	Leader	
<None>			
HANSON Thomas	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

**Teammates**

User	Selected by default	Leader	
HANSON Thomas	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
MALONE Richard	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
ROBBS Harry	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
<Choose>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

Figure 7.121: Defining a team 'Report Writers'.

[Planning Administration Page] Teams :

**Teams**

Name	Short name	Function	Users	Visible	Accessibility	
Report Writers	Writers	<None>	Dick, Harry, Tom	Yes	Open	

## 7.11.5 Holiday use

How to exhaustively manage employees' vacations is elucidated in the following.

### 7.11.5.1 The *My Holidays Page*

As accessed via the eponymous button as found on the *Main Planning Page*, this page as illustrated on Fig.7.122 offers the **current user** a general view upon her/his holidays, featuring :

- a search tool by holiday status (all, pending, confirmed, refused and canceled) ;
- a search tool by year, including the current, previous and next ones.

[Main Planning Page] **My holidays** :

**My holidays**  
Jack JONES[Administrator]

Status :  Year :

Start	End	Duration	Status		
22/06/2011	28/06/2011	4 days	Confirmed	<a href="#">View</a>	<a href="#">Modify</a>
17/01/2011	20/01/2011	2 days - 4 hours	Confirmed	<a href="#">View</a>	<a href="#">Modify</a>
10/01/2011	10/01/2011	1 day	Confirmed	<a href="#">View</a>	<a href="#">Modify</a>
27/12/2010	06/01/2011	8 days - 4 hours	Confirmed	<a href="#">View</a>	<a href="#">Modify</a>

Figure 7.122: User Jack Jones views his confirmed 2011 holidays.

Search results are shown in a table giving holiday's start and end dates, duration, and status ; also, two click-links allow to view (7.11.5.3) and modify (7.11.5.4) in detail this holiday, while, at the bottom of the page, a button allows to plan  (7.11.5.2).

### 7.11.5.2 Planning holidays

Holidays, for a given user, can be planned according to the value of "Holiday rights" (7.11.2) :

- by herself/himself if they, for 'Owner', are at least set to 'Create/Modify' ;
- by others if they, for 'All', are at least set to 'Create/Modify'.

Planning new holidays will create a holiday request that will be reviewed by the person in charge of it (7.11.5.7).

Holidays can be planned in two possible ways, either of them leading to a screen as featured in Fig.7.123 and 7.124, where start and end dates can be chosen with two pop-up calendars :

- via the *Main Planning Page*, by clicking on an empty cell (and then choosing "Holidays" on the Manage Day pop-up, 7.11.3.2) : both calendars will then be set to the date corresponding to the clicked cell ;
- or via the **New holidays** button as found on the *My Holidays Page* (7.11.5.1).

It is to note that both start and end dates can be modified. If user has enough days remaining to take her/his planned holiday, the request is validated and user is either redirected to the *Main Planning Page* or *My Holidays Page*, where this new request is seen as pending.

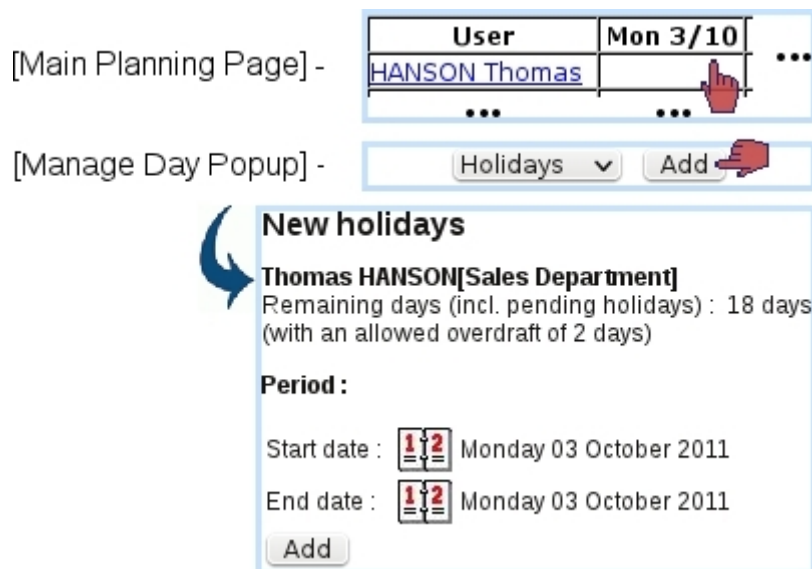


Figure 7.123: Defining new holidays, directly from the Holiday planning.

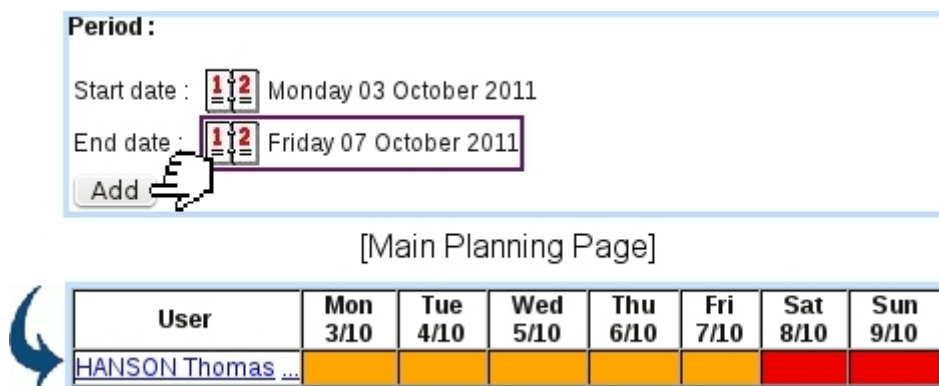


Figure 7.124: Once start and end dates have been chosen, new holidays can be finally validated.

The holiday request as created assumes that full days are taken ; **if user wishes to plan half-days (or more complicated hourly patterns), the (still unreviewed) request can be then modified (7.11.5.4).**

It is to note that, thanks to the overdraft amount as set during assessing workweek profile to users (7.11.4.4), a user can plan holidays/do modifications that go over her/his day balance.

### 7.11.5.3 Viewing holidays

[Jack's My Holidays Page] 17/01/2011 | 20/01/2011 | ... | [View](#) :

**View holidays**

User: **Jack JONES[Administrator]** - From 17/1/2011  to 23/1/2011

Holiday dates : **17/01/2011 - 19/01/2011** confirmed by admin on 14/1/2011 15:50

---

	Mon 17/1	Tue 18/1	Wed 19/1	Thu 20/1	Fri 21/1	Sat 22/1	Sun 23/1
8 - 9							
9 - 10							
10 - 11							
11 - 12							
12 - 13							
13 - 14							
14 - 15							
15 - 16			At shop				
16 - 17							

Figure 7.125: User Jack views his confirmed holidays.

A user can have a detailed view her/his holidays via the [View](#) link as available on the *My Holidays Page* (Fig.7.122). This link is always available whatever holiday's status is. Clicking on it leads to what is shown for instance on Fig.7.125 : the whole span of the holidays is shown vertically, while now horizontally, the schedule of days/hours is detailed.

This detailed view is also accessible from the *Main Planning Page* by simply clicking on the related holiday.

The span of displayed hours depends on user's planning properties (7.11.4.4).

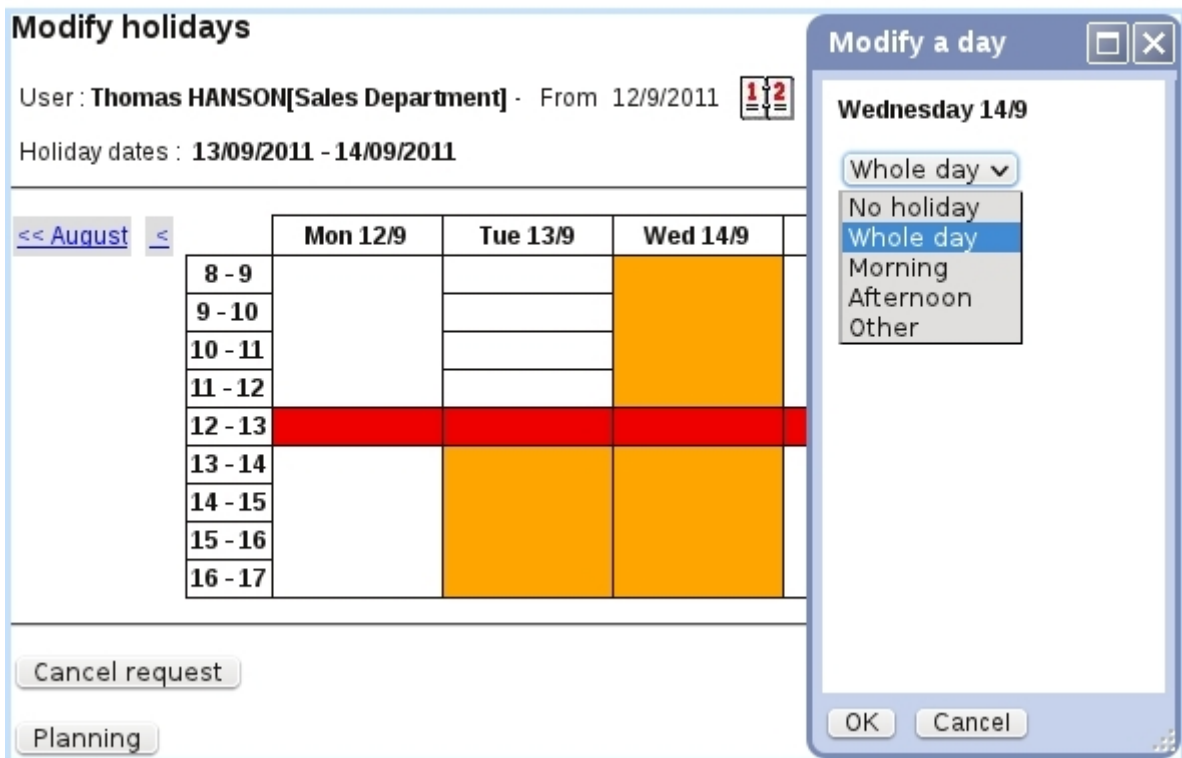


Figure 7.126: Showing the choices to which modify the Wednesday of this holiday request.

#### 7.11.5.4 Modifying holidays

For most users, i.e. whose 'Holiday' right as 'Create/Modify', modifying holidays is only possible with those which have not been confirmed/refused yet. "Manager" users, with 'Review' rights on the other can modify holidays which have been confirmed.

Accessing the page where a holiday is modified can be done :

- either from the *Main Planning Page* (provided that the displaying of pending holidays has been enabled through the checkbox) by clicking any day of the aimed request. This can be achieved by user herself/himself (provided that s/he is able to create holidays for herself/himself) and other users (provided their "Holiday rights" for 'All' are at least set to 'Create/Modify') ;
- or via the [Modify](#) link as available on the *My Holidays Page* (only for related user).

Either way, user is led to the page as featured in Fig.7.126, where, in a detailed presentation very similar to the *View Holidays* one, each day can be clicked on. A pop-up then appears with various choices, to apply changes to this selected day :

- canceling this day from the request ("No holiday") ;
- making it a Whole day ;

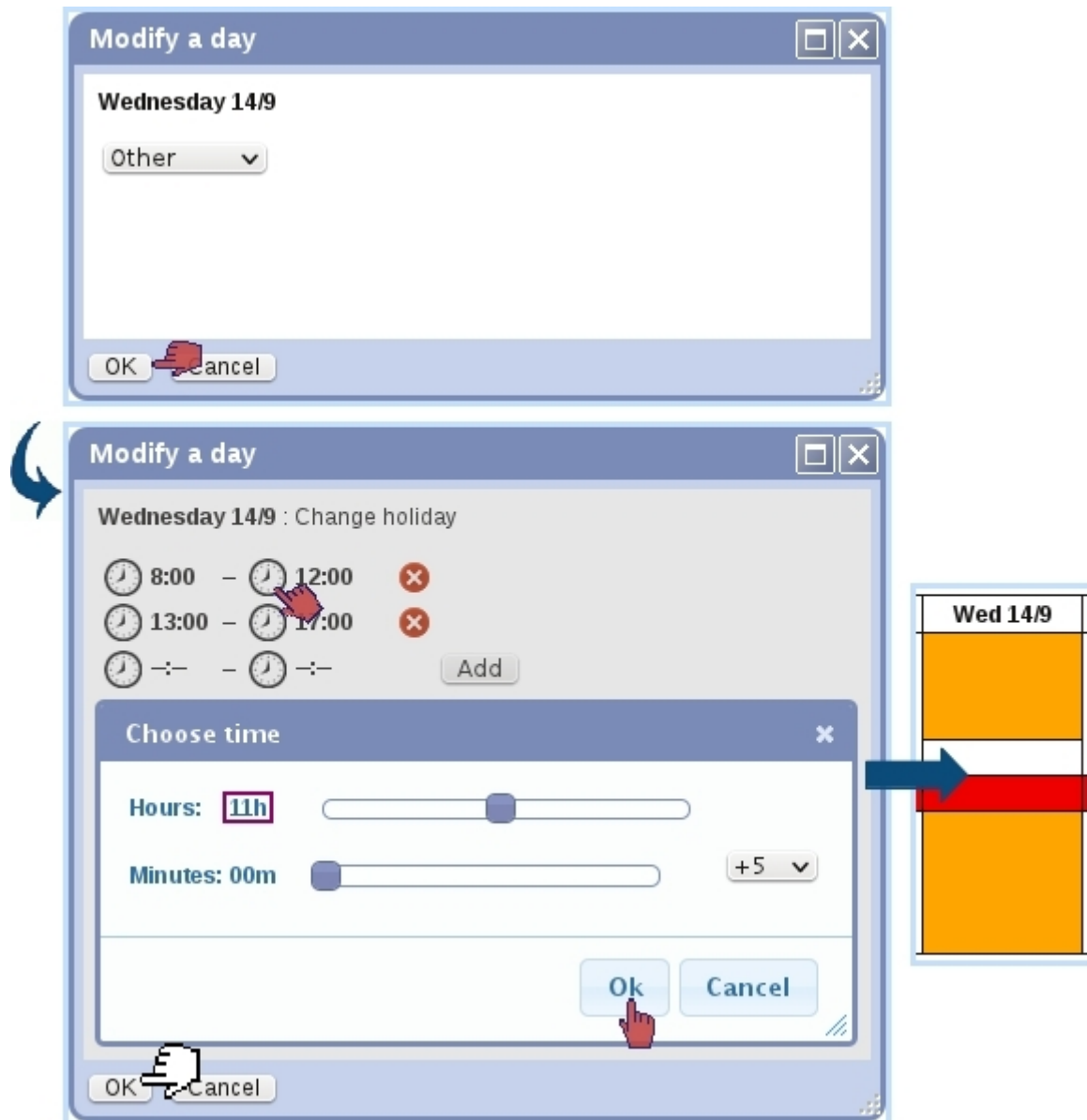



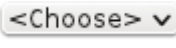
Figure 7.127: Defining a schedule for this Wednesday, where off-time is counted in a matter of hours and minutes.

- taking only the Morning or Afternoon ;
- choosing a detailed hourly schedule ("Other"), as shown on Fig.7.127.

A begin or end time is fixed the following way :

- the corresponding clock  is clicked ;
- a new window appears, where hour and minute sliders allow to choose a specific time ; depending on what has been selected in the menu right to the minute slider, minutes can be chosen either as :00 or :30 ("+30"), by gaps of 5 minutes ("+5") or by gaps of 1 minute ("+1") ;

- clicking on "Ok" then validates the time.

A predefined workday profile (7.11.4.1) can also be chosen in the  menu.

Whichever choice is made, and provided related user has enough hours left to make certain change, the modifying appears immediately.

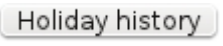
**7.11.5.4.1 Adding new days to a holiday request** If user has at least one day or enough hours left, s/he (or a high-clearance user with sufficient rights) can add a new day to the current holiday request as displayed on the *Modify Holiday Page* by simply clicking a blank day : a pop-up window, with similar choices as shown above (except of course for "No holiday") will be shown.

While it is possible to add a day that is not contiguous to the already-existing holiday period, it is not possible to add a day so that another request stands between this day and the current request.


**7.11.5.4.2 Canceling a holiday request** Similarly as for modifying, a holiday request can be canceled by related user if it has not been confirmed yet. "Manager" users, with 'Review' rights, can cancel requests which have been confirmed.

The cancellation is then achieved via the  button as seen on Fig.7.126.


#### 7.11.5.5 User's holiday history

A page displaying a user's holiday history for the current year (as well as for the previous year) is available through the  as found in the User's Information pop-up (7.11.3.1). This page can also be accessed directly via user's name click-link as found on the *Manage Users' Holidays Page* (7.11.5.6) and the *Credit/Debit Page* (7.11.5.9).

An example of holiday history is featured at Fig.7.128. This page shows for this particular user and the current year the various holidays that have been confirmed, as a click-link to the *View Holiday Page* (7.11.5.3) ; also shown are holiday credits and debits (other than vacations) that have been done for this user (7.11.5.9).

At the bottom of the User's Information pop-up (or at the bottom of the page when holiday history is accessed through the aforementioned other means) lies a  button allowing to generate a formatted PDF file of the display, along a print model (13.2).

#### 7.11.5.6 The *Manage Users' Holidays Page*

For users that have been granted sufficient ('Credit/Debit') "Holiday rights", the *Manage Users' Holidays Page* is accessed through the  button rendered available at the *Main Holiday Page*.

[Main Planning Page] [Jane Kovács](#) / [Holiday history](#) :

**User information**

**Holiday history**

**Jane KOVÁCS[Accounting]**  
Pending holidays : 5 days

Year : [2011](#) [Show](#)

Request	Confirmation	Label	Days	Hours
-	03/01/2011	Transfer 2010-2011	10	6
-	05/01/2011	Credit 2011	25	0
11/03/2011	14/03/2011	<a href="#">21/03/2011 - 01/04/2011</a>	-10	0
15/06/2011	17/06/2011	<a href="#">20/06/2011 - 24/06/2011</a>	-5	0
<b>Total :</b>			<b>20</b>	<b>6</b>

**Remaining holidays : 20 days 6 hours**

Print model : [<Choose>](#)

[Print](#) [Back](#)

Figure 7.128: The *Holiday History Page*.

[Main Planning Page] [Staff holidays](#) :

**Staff holidays**

User group : [Accounting](#) User : [<All>](#)

User status : [Enabled](#) User type : [merchant company](#) [Search](#)

Request status : [Pending](#) Year : [2011](#) - Print model : [<Choose>](#)

**2 pending requests, group Accounting, 2011 :**

User	Request date	Period	Status	
<a href="#">KOVÁCS Jane</a>	24/11/2011	05/12/2011 - 09/12/2011	Pending	<a href="#">Review this request</a>
<a href="#">RUSSELL Mary</a>	15/11/2011	07/12/2011 - 09/12/2011	Pending	<a href="#">Review this request</a>

[Credit management](#) [Planning](#)

Figure 7.129: The *Manage Users' Holidays Page*.

There, as featured on Fig.7.129, search tools consisting in user groups, users, user access status, holiday status and year allow to display holiday requests. For confirmed requests, a [Print](#) button is available to generate a print-friendly PDF account on the request, along a print model (13.2).



For pending requests, if user has even superior rights ('Review'), a **Review this request** button is available to accept or deny this holiday request (7.11.5.7).

The **Credit management** button leads to a page where users' holiday credit can be modified (7.11.5.9).

**7.11.5.6.1 The "Pending request" event control** When a user logs in, provided that s/he has got 'Review' rights, the pending requests to process (7.11.5.7) may be conveniently displayed in an event control (1.3) as featured in Fig.7.130. There :

- each request can be clicked and reviewed individually ;
- the more [more](#) link leads to the *Manage Users' Holidays Page* where all pending requests (whichever the user, user group and year) are displayed.



Figure 7.130: The HRM event control, displaying pending holiday requests to process.

### 7.11.5.7 Accepting/refusing a user's holidays



Figure 7.131: The displaying of full user group's schedule helps to decide whether to accept or not user's requested holidays.

With conditions stated above, the **Review this request** is available and leads to the page as featured at Fig.7.131, where :

- related user's holidays are displayed in all their duration, along with the holiday schedule of all the users of her/his user group : this thus allows to have a documented view of what everyone in the related user group is at at the time of those requested holidays. Therefore, this allows for instance to prevent that everyone in the same user group might be on holidays at the same time ;
- this schedule can be browsed in a weekly or monthly way, along with two browsing calendars (similarly as on the *Main Planning Page*) ;
- clicking on any pending day, whether it belongs to the reviewed user or any user of her/his group, allows to see it in detail and even to modify it, similarly as in 7.11.5.4.

When decision is made, holiday request is either confirmed or denied via the **Accept** and **Refuse** buttons.

Whatever the decision is, an email is sent to the user who requested the holidays, and also, if applicable, to the users who were set as the recipients of confirmation mails (7.11.4.7).

#### 7.11.5.8 Pre-evaluating a user's holidays

Some users (who are for instance the leader of their group), though they do not have the administrative rights to accept or refuse holiday requests, may nonetheless be able to give their opinion - positive or negative - on a holiday request ; this is ruled by the 'Holiday supervisor' right (7.11.2).

For instance, Tom, who has this right set to 'Evaluate' for his group and user Richard had been set as a (passive) sender of holiday notifications (7.11.4.7) : these are the two conditions for the 'Evaluate : ' choice to appear on Richard's *Modify Holiday Page* as seen by Tom (Fig.7.132).

This possibility helps administrators (who might not always be up-to-date about the schedule of a user group) to make the decision of accepting or refusing holidays.

#### 7.11.5.9 Managing users' holiday credit and debit

As a depleting resource, holidays are replenished from time to time in the form, for instance, of a yearly credit. To do so, a convenient page is accessible via **Staff holidays** / **Credit management** (a button which only appears when user's "Holiday management" (7.11.2) is at least set to 'Credit/Debit'), as featured on Fig.7.133. There :

- a specific user group and/or user can be chosen (and user access status, 9.4.3), as well as year on which the operation will be credited/debited on ;

[Harry's Modify Holidays Page, as seen by Tom] :

**Modify holidays**

User : **Richard MALONE**[Sales Department] - From 11/6/2012 1 2 to ...

Holiday dates : **11/06/2012**

---

<< May <

	Mon 11/6	Tue 12/6	Wed 13/6	Thu 14/6
8 - 9				
9 - 10				
10 - 11				
11 - 12				
12 - 13				
13 - 14				
14 - 15				
15 - 16				
16 - 17				

---

Evaluation :

[Harry's Review Holidays Page, as seen by Admin] :

**Review holiday request**

User : **Richard MALONE**[Sales Department] - From 11/6/2012 1 2 to ...

Holiday dates : **11/06/2012** - Evaluation : Positive(Thomas HANSON)

...

Figure 7.132: Tom, a holiday supervisor for his own group, views Richard's unconfirmed holidays and can give his opinion on them.

- on the then displaying list of users, each of them can be chosen (or not) via a checkbox (it is also possible to select all users through the eponymous button) ;
- an amount of days and/or hours is given, to be either credited or debited ;
- a label can be entered, which will then be displayed on the *Holiday History Page* (7.11.5.5).

Also, a  button conveniently allows to automatically transfer vacation balance of selected users to the year following the one featured in the menu ; for instance, if "Transfer selected users balance to 2013" appears (year 2012 is selected in the menu) :

- clicking on that button will thus set to 0 balances for 2012 and,
- on *Holiday History Page* for 2013, the transferred balances will appear with the label "Transfer 2010-2011".

**Users' holiday credit management**

User group : [Sales Department](#) User : [<All>](#)

User status : [Enabled](#) User type : [merchant company](#) [Search](#)

Year : [2012](#)

---

	User	Current workweek profile	Days	Hours
<input checked="" type="checkbox"/>	<a href="#">HANSON Thomas</a>	Regular	11	4
<input checked="" type="checkbox"/>	<a href="#">MALONE Richard</a>	Regular	9	4
<input type="checkbox"/>	<a href="#">ROBBS Harry</a>	Sat Morning	16	5

[Select all](#)

Add to selected users  days -  hours

Credit  Debit

Label : [Bonus AAA Salesmen](#)

On year : 2012

[Add](#)

---

Transfer selected users' balance to year : 2013

[Transfer](#)

Figure 7.133: An example where some extra holidays are credited to a few selected users.

### 7.11.6 Overtime management

During the course of a company's life, employees may have to work further hours than they are supposed to or work during days where their weekly schedule (7.11.4.1) means they are not supposed to.

This is why Blue Chameleon's HRM handles the management of overtime, through a simple interface, which can be brought up in two ways :

- by clicking on a white part of the planning, bringing up the Manage Day pop-up (7.11.3.2) and choosing 'Overtime' ;
- by clicking on a red part of the planning for adding work in that normally un-worked day.

Fig.7.134 shows for instance how a Saturday morning is declared as worked, by a user who is not supposed to work that day. On the then-displayed *Change Work Schedule Page* :

- hour and minute menus for start time and end time are displayed, from which a worked span can be filled in ;
- several worked spans can be **Add**'ed, provided than they do not overlap ;
- a worked span can be deleted through the **✖** icon ;
- a predefined worday profile (7.11.4.2) can be selected in the **<Choose>** menu to load a specific schedule.

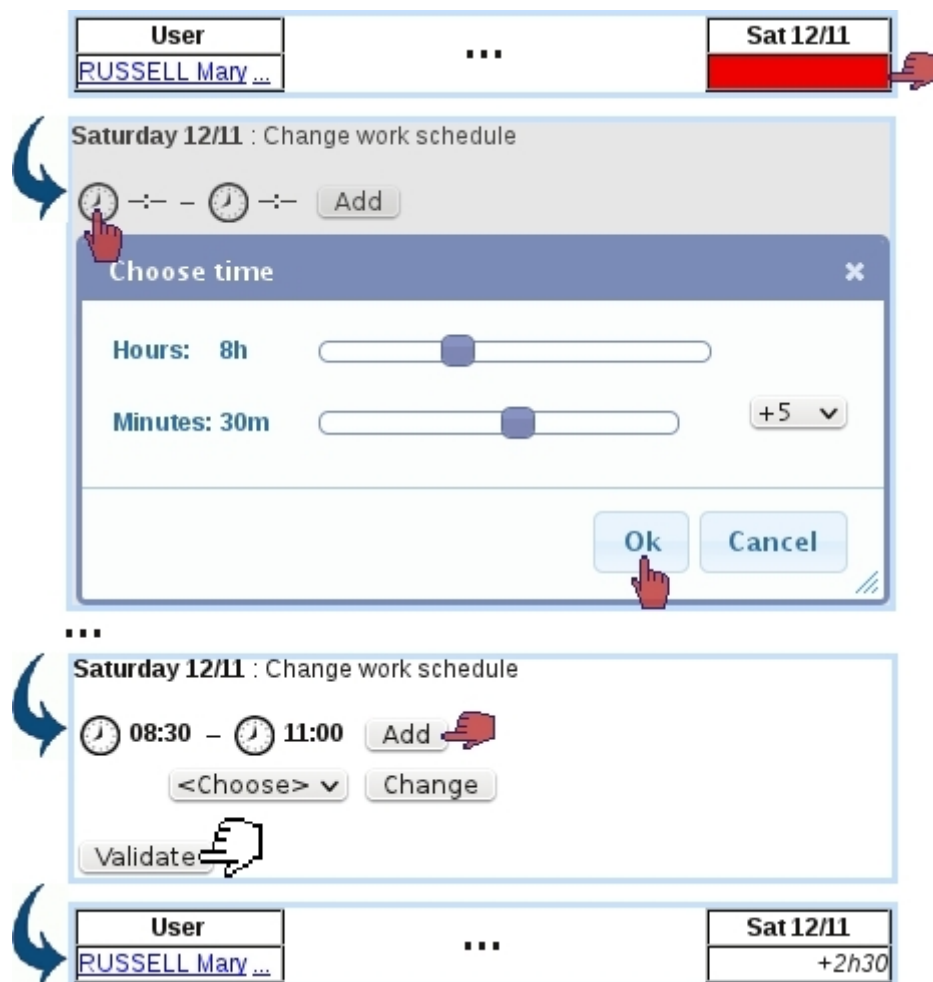


Figure 7.134: Declaring this Saturday morning as worked.

Afterwards, the overtime is featured on the *Main Planning Page* : the clicked cell has been rendered white and the overtime amount in hours and minutes is featured.

The adding of overtime for an already-worked day is done through a similar interface, except than worked times are pre-loaded. They can be modified and other worked spans can be added :

Tue 8/11  
 [Manage Day Popup] Overtime ▾ Add :

**Tuesday 8/11** : Change work schedule

🕒 8:00 - 🕒 12:00 ❌

🕒 13:00 - 🕒 17:00 ❌

🕒 :- - 🕒 :- Add

<Choose> ▾ Change

Validate



Changing the schedule of an already-worked day also allows to define **undertimes**, e.g. in case employee got in late. They will be featured as negative time, for instance "-3h30".

Overtimes can be seen as a summary on the month's work history (7.11.8).

### 7.11.6.1 Modifying overtimes

Once a planning cell is endowed with overtime (or overtime), this overtime can be modified by using the "Overtime" option again at the bottom of the *Manage Day Popup* (Fig.7.135).

Tue 8/11  
 +2h45 [Manage Day Popup] Overtime ▾ Add :

**Tuesday 8/11** : Change work schedule

🕒 8:00 - 🕒 12:00 ❌

🕒 13:00 - 🕒 19:45 ❌

🕒 :- - 🕒 :- Add

<Choose> ▾ Change

Validate

Figure 7.135: Accessing the details of a workday.

### 7.11.7 Changing a workweek or a workday to another profile

The configuring of workweek profiles for an employee (7.11.4.4.1) showed extensive and detailed possibilities for those for the whole year.

Now, in order to change in a more casual way, by user herself/himself (or, depending on the user rights, others users) the profile of a week (stemming for instance from an exceptional change) for profile of a particular week, Blue Chameleon's HRM allows it to be done directly from the planning, by bringing up the Manage Day pop-up (7.11.3.2).


There, a menu below 'Weekly planning' shows the current workweek profile that had been configured for the week ; this menu features all already-defined workweek profiles (7.11.4.1) and it is then possible to change week to any of those.

The same can be done for a single day : a particular planning can be set for the clicked day, **independently from the week's profile**. Under 'Daily planning', the already-defined workday profiles (7.11.4.2) are shown and the clicked day can then be set to any of those. In order to reinitialize the workday profile to the one given by the workweek profile, 'Choose' must be selected.


## 7.11.8 Work history

In order to keep track of overtimes at a glance, or more generally to check the number of worked hours, holidays and sick leaves in a month, Blue Chameleon provides a detailed monthly account of the work history. It is accessed through the eponymous button as found on the User's Information pop-up (7.11.3.1).

Fig.7.136 shows an example where the overtimes as defined as examples in 7.11.6 can easily be seen. The normally-worked days, as defined by employee's weekly schedule (7.11.4.1), is shown just after the 'Activity' column. Any day which is at least partially worked (this includes days which are partially holidays or sick leaves) is featured there.

At the bottom of this popup, a PDF version of the month's work history can be ed out along a print model (13.2).

### 7.11.8.1 Converting overtime

As seen on Fig.7.136, next to each overtime, there is a  button that allows, as shown on Fig.7.137, to convert overtime in a equal amount of vacation time. This button only appears if user has 'Credit/Debit' rights.

Clicking on this button shows a popup where a time range is chosen, the amount of which will be added as vacation hours. In this example, the overtime corresponded to a worked Saturday morning, from 8 to 12 ; we choose to fully convert it by inputting those times in the hour menus.

As a result, on the *Holiday History*, this credited will appear as 'Compensation [Date]'.

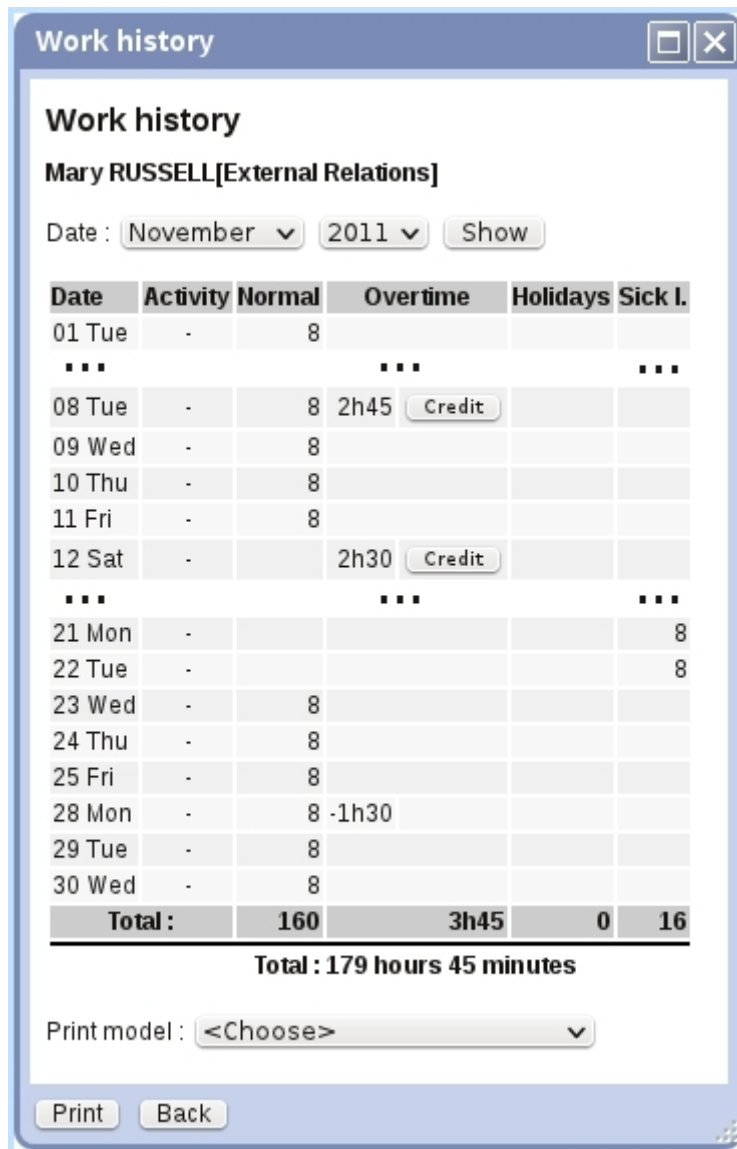


Figure 7.136: The work history for this user on November 2011.

### 7.11.9 Sick leaves

Sick leaves are planned and handled in a very similar way as for holidays, but this time without restriction of a limited number of days, and according to the value of the "Sick leave right" (7.11.2).

Declaring a sick leave is then done :

- by clicking on an empty cell on the *Main Planning Page*, thus bringing up the *Manage Day* pop-up (7.11.3.2) and choosing "Sick leave" there ; it then redirects to an identical page (with two calendars) as seen for new holiday planning ;
- by clicking on a cell that already contains a sick leave ; redirected on a *Modify Planning Page*, identical to the *Modify Holidays* one (Fig.7.126), it becomes possible, by clicking on an empty day, declare this day as a sick leave.





[Holiday History] :



Figure 7.137: Crediting overtime as vacation time.

### 7.11.9.1 Modifying sick leaves

Modifying already-defined sick leaves is done through the *Modify Planning Page*, where clicking on the sick day brings a pop-up where sick leave can be modified to Morning only or Afternoon only, to the Whole Day, or to another more complicated schedule (just as in Fig.7.127). The sick leave for that can be also canceled through the 'None' choice.

### 7.11.9.2 Sick leave history

Identically as for holiday history, a reminder of a user's sick leave history for the current year (and also the previous one) can be displayed through the **Sick leave history** button as found on the User Information pop-up (7.11.3.1). A **Print** tool to generate a PDF account of the user's sick leaves (dates) is also available.

## 7.11.10 Activities

If wanted, activities as used in the planning aim to make more precise what an employee is at ; they are individually assessed to a particular user at a particular day.

For the 'activities' feature to be properly used :

- Activity categories (7.11.4.6.1) and activities (7.11.4.6.2) must be defined ;
- a category must be assessed to each user (7.11.4.4), if one wants her/him to use them.

### 7.11.10.1 Setting activities for a day

Most easily, activities can be assessed from the Manage Day Popup (7.11.3.2) for any day ; the conditions as cited above must be filled. In addition to this, user must have enough rights to assess 'Activities' (7.11.2).

As featured on Fig.7.138, the *Manage Day Popup* is opened for user Tom on a certain day ; he was configured on his *Configure Employee Page* (7.11.4.4) as belonging to the category 'Salesmen', for which two activities 'At shop' and 'Biz trip' were defined. They can be thus assessed to him, one for the morning, one for the afternoon.

[Manage Day Popup, HANSON Thomas, 23/03/2012] :

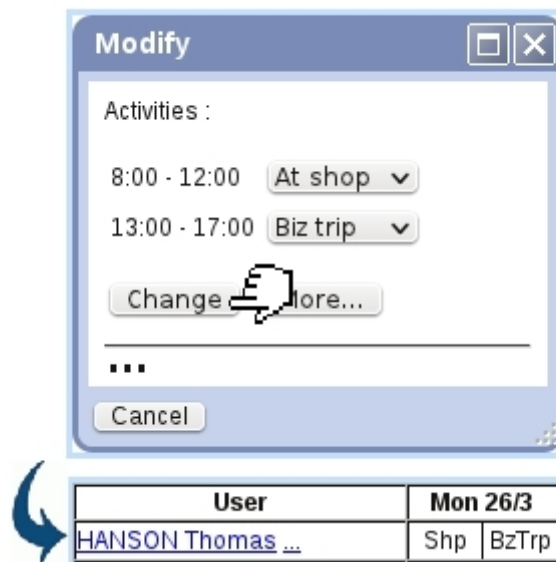


Figure 7.138: Changing Tom's activities for a day.

Happening in the same day, they finally appear in the planning in their short label form, as to reduce the span of the display.

### 7.11.10.2 Setting activities for a week or month

As the previously described daily setting of activities can be too time-taking for long, homogenous periods of activities, the **More...** button as seen right to the **Change** one (Fig.7.138) allows for weekly and monthly settings of activities.

As shown at Fig.7.11.10.2, clicking on the **More...** button then displays a popup where two choices are available through a toggle : either show the current week, or the current month :

- in the former case, activities of that week are set day by day (that is worked), with a single choice for each day, applying to the whole day ;
- in the latter case, activities of that month are set week by week (for each week that at least has a worked day), with a single choice for each week, applying to the whole week.

This systems allows for fast configuring of employees' activities, if those do not vary much during a day or during a week. If activities set that quick way need to be fine-tuned for a certain day, it can still of course be modified in a daily way as described in 7.11.10.1.

[Manage Day Popup, HANSON Thomas, 18/06/2012] [Activities] More... :

**Modify activities** □ ✕

**Activities for HANSON Thomas**

Week 18-24 June 2012  June 2012

Mon 18/6	Tue 19/6	Wed 20/6	Thu 21/6	Fri 22/6	Sat 23/6	Sun 24/6
<input type="text" value="At shop"/>	<input type="text" value="At shop"/>	<input type="text" value="At shop"/>	<input type="text" value="Biz trip"/>	<input type="text" value="Biz trip"/>	.	.

Modify Cancel

**Modify activities** □ ✕

**Activities for HANSON Thomas**

Week 18-24 June 2012  June 2012

Set weeks to :

28/05/2012 - 03/06/2012	: <input type="text" value="&lt;Choose&gt;"/>
04/06/2012 - 10/06/2012	: <input type="text" value="&lt;Choose&gt;"/>
11/06/2012 - 17/06/2012	: <input type="text" value="&lt;Choose&gt;"/>
18/06/2012 - 24/06/2012	: <input type="text" value="&lt;Choose&gt;"/>
25/06/2012 - 01/07/2012	: <input type="text" value="&lt;Choose&gt;"/>

Modify Cancel

Figure 7.139: Setting activities for a whole week or a whole month.

# Chapter 8

## Customer Support

The right and convenient way of handling customer complaints and requests through Blue Chameleon's Ticket System will be unveiled in this Chapter.

All commands explained in this section are accessible from [Add-ons](#) / [Helpdesk](#).



*Helpdesk access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

*[Menu script user rights :] Helpdesk*

### 8.1 Helpdesk setup guide

The following guide mainly refers to functions explained in *Advanced Functions and Configuring* (10).

1. creation of ticket types (10.2.1) and their related categories and parameters (10.2.2.1) ;
2. if to be used in the future, creation of predefined emails (10.2.2.2), texts (10.2.2.3) and durations (10.2.2.4) ;
3. creation of ticket styles (10.3) ;
4. editing user details for helpdesk (10.4) : style, rights and ticket types ;
5. editing user group details for helpdesk (10.5).

## 8.2 Ticket purposes and basics

The Blue Chameleon Ticket system has two main primary goals :

- to keep a record of your Customer Support service's activity, that is to say the clients' problem descriptions as well as the different steps taken to solve them ;
- to efficiently plan the resolving of client problems according to their priority and the date of their issuing.

### 8.2.1 Creating a ticket



*Successful ticket creation requires a defined ticket type category and parameter (10.2.2.1).*



*User right for ticket creation can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

*[Custom script user rights :] Insert client ticket*

Once a complaint is received, issuing a ticket is done via the main *Customer Support Page*. From this page as accessible via **Add-ons** / **Helpdesk** and featured in Fig.8.1, simply click on the **New ticket** button to choose the client that issued the complaint.

Once it is done, you will be brought back to the *Customer Support Page* and see the aforementioned button has changed into **New ticket : Smith.John** (in this example) ; it leads to the *New Ticket Page* (Fig.8.2), which lists the client's main data.

There :

- select a ticket type (10.2) and a subsequent ticket parameter (10.2.2.1) to assign to this ticket ; the request in the chosen example is a 'Customer' ticket, of the parameter 'Product' ;
- ticking the Notification Email box allows you to send a mail to the client ; if so, the title menu will provide predefined notifications (10.2.2.2) to choose from ;
- Once you are done, finally click on the **Create** button ; this will definitely create your ticket, as well as leading you to the *View Ticket Page* whose details are fully explained at 8.3.3.

Tickets can also be created when an Agenda appointment is added (7.2.3.1), provided that the corresponding agenda supports ticket assignment (7.2.2.3.1).

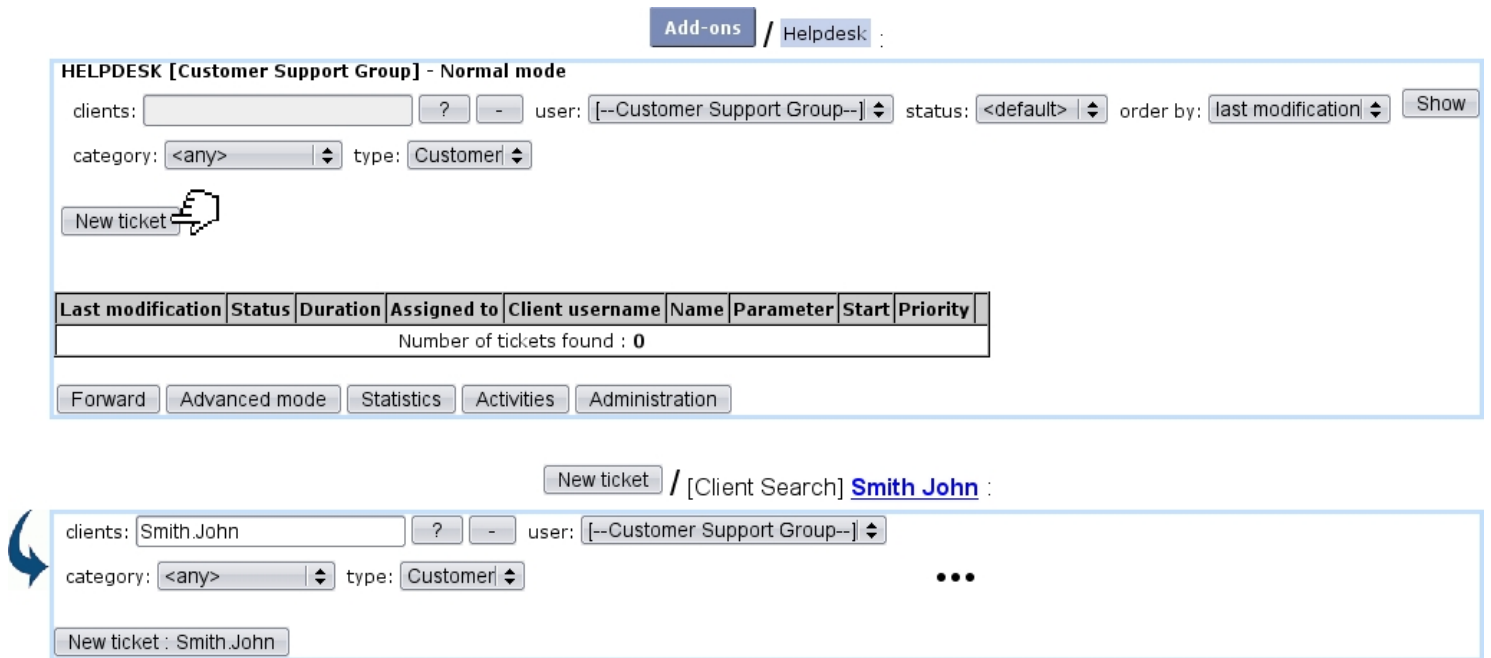


Figure 8.1: The main *Customer Support Page*, ready to create a ticket for client John Smith.

## 8.2.2 Creating tickets for other objects (In Development)

The above described how to create a ticket for a client ; it is to note that Blue Chameleon also allows to create tickets pertaining to other objects, such as prospects (7.9.3), articles, subscriptions, invoices and orders.

In order to create a ticket pertaining to any of these things, the page accessed via **New ticket** or **?** provides at the bottom an **Other object** button leading to what is seen at Fig.8.3.

## 8.2.3 Ticket statuses

Ticket statuses are five :

- new, which is the default status when the ticket is created ;
- open, which is the status a 'new' ticket can be changed to in order to mean it has to be processed ;
- client pending ;
- event pending, which puts the ticket in stand-by until a call-back date, set thanks to a calendar that pops-up when this status is validated ;
- closed, which serves to mean that the issue has been resolved.

New ticket : Smith.John :

**HELPDESK [Customer Support Group]**

Client username : **Smith.John** Ordered articles Ticket list

Name : **Smith John**

Address : **12 Orange Road**

Post code : **90000** City : **Los Angeles**

Country : **USA**

Tel. number : **555 1234**

Email : **john.smith@mailserv.com**

Payment status : **First reminder**

Language : **English**

---

Ticket type : Customer

Complaint : Product

---

Email Notification

Email : john.smith@mailserv.com Title : compl. being processed

---

**Dear Sir/Madam,**

**Your request is currently being processed.**

We thank you for your patience.

**Kind Regards**

---

SMS Notification

---

Create
Cancel

Figure 8.2: The *New Ticket Page* displaying client information and allowing to pick ticket type parameter and to type a notification email to the issuing client.

## 8.2.4 Ticket duration

Ticket durations, according to the choice made for the relevant ticket type (10.2.1) can be optional and be chosen in a menu as predefined in the Helpdesk administration (10.2.2.4). Their goal is to add to a ticket, anytime an action (8.4) is performed, a time attribute, **corresponding to the estimated time the action will take.**



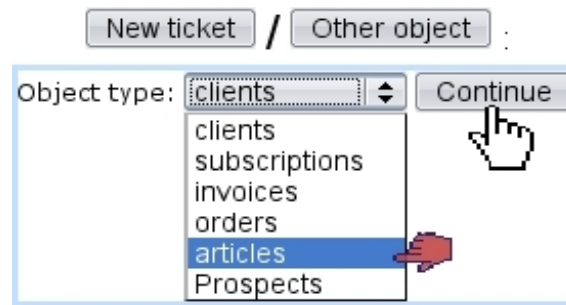


Figure 8.3: Creating a ticket for any object, pertaining to people (clients, prospects (7.9.3.1)), items (articles, subscriptions), invoices, orders...

As actions on a single ticket follow each other, duration builds up and is featured at the Ticket Table (8.4).

### 8.2.5 Ticket priorities

Tickets, if the related ticket type allows it (10.2) may be assessed different priorities, that are chosen from previously-defined service level agreements (9.5). As seen on Fig.9.19, for instance three SLAs/priorities 'Normal', 'Priority' and 'Urgent' can thus be defined.

As a rule, on the ticket table as illustrated on Fig.8.4 below, tickets are sorted :

- first by their priority (if the ticket type they belong to actually has one) according to the level given to the corresponding service level agreement : in this case 'Urgent' tickets will appear first ;
- then, by their last modification date, also in descending order (last modified ticket first).

If a ticket has a defined priority, user will allowed to edit it according to her/his particular Helpdesk settings (10.4.1) and the available priorities to choose from then depend on user's commercial access levels (11.1.1.3).

## 8.3 Searching for tickets and displaying them


As the number of tickets grow, they might become more and more difficult to go through ; therefore, Blue Chameleon supplies extensive search options to look for them.

### 8.3.1 Different ways to look for tickets


Once tickets have been created, the main *Customer Support Page* displays them, as pictured in Fig.8.4 which shows the ticket created above ; the [View](#) links at the end of the table lead to the corresponding ticket's *View Ticket Page* (see below).

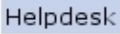
It is also possible to search into them after having chosen criteria for which you wish to see corresponding tickets. First, you have to be sure that the user's 'Menu View:' is

set to 'Client Search' (10.4.1) to have all search options.

If for instance you want to see tickets pertaining to a specific client, just click the  button, which will lead you to a *Client Search Page* ; after having clicked on the aimed client's name, you will be brought back to the *Customer Support Page* and tickets for this client will be displayed.

Another way of achieving this is via the  button while at the *Client Management Page* (2.3) for this client.

By the help of three drop-down menus, you can also run a search by specifying the user to whom the ticket has been assigned, its current status and type and finally  for results.

 :

Last modification	Status	Duration	Assigned to	Client username	Client	Parameter	Start	Priority	
1/6/2010 9:40	new	0 min.	James	Smith.John	<a href="#">Smith John</a>	Product	1/6/2010 9:40	Normal	<a href="#">View</a>
Number of tickets found : <b>1</b>									

Figure 8.4: The *Customer Support Page*, displaying the recently-created ticket for client John Smith. The [View](#) link at the far right of the table leads to the *View Ticket Page* (8.5) for this particular ticket.

### 8.3.2 Styles for displaying tickets

In the ticket table as shown in Fig.8.4, in order to distinguish between tickets of different types, different displaying options (colors for background and font, font styles) can be assessed to each ticket type : this is accomplished from the *Ticket Administration Page* (10.3).

Also, two tickets belonging to the same type can be made to appear differently (10.12).

### 8.3.3 The *View Ticket Page*

This page is accessed just after the creation of a new ticket and also by clicking the corresponding [View](#) link from the *Customer Support Page*. This page for the current example is featured at Fig.8.5 ; it displays the ticket's information, mainly consisting in :


- the ticket's ID ;
- the start date and time, at which it is created ;
- the date and time at which it was last modified ;
- its duration (8.2.4) ;

- the ticket type (10.2) and the parameter (10.2.2.1) you defined it to be.

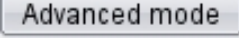
There are also properties that can be modify via drop-down menus :

- the ticket's status (8.2.3) ;
- the user to whom it is assigned : by default, the creating user, but it can be changed according to the actions to take (see Fig.8.7 for an example) ;
- the ticket's type (if ticket type allows to, 10.2.1)
- the ticket's priority (if : ticket type allows to (10.2.1) and user is allowed to, 10.4.1) ;
- the visibility of the ticket (if ticket type's visibility is set to 'private or public' or 'public or private, 10.2.1).

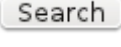
Any change is to be validated via the corresponding buttons, respectively , , ,  and .

Also available is the  button, whose great utility will be explained in 8.4.

### 8.3.4 Ticket display details - The Advanced Mode

The Advanced Mode is a display mode that is switched on by clicking the  button at the bottom of the main *Customer Support Page* (this button is only available if the user's 'Menu View:' is set to 'Search Criteria' or 'Client Search' (10.4.1)).

On this Mode, you now have two more options to display tickets, as drop-down menus : the user who opened the ticket and the number of tickets displayed, 50, 100, 200, 500 or all of them (the previous mode, Normal Mode displays 50 tickets).

Once you have chosen your options, refresh displaying via . You can go back to the Normal Mode any time by clicking the same button which brought you here : this button indeed toggles between Advanced and Normal modes.

(...) [Smith John](#) (...) [View](#) :

**HELPDESK [Customer Support Group] - View ticket(232)**

Ticket ID : **232**

Start : **2/1/2012 9:40**

Last modification **2/1/2012 9:40**

Duration : **0 min.**

Status : **new**  |

Opened by : **James**

Assigned to : **James (Customer Support Group)** [-----] |

Type : **Customer**  |

Complaint : **Product**

Display :  **default**

Font :  **default**

Priority :  |

Visibility :  |

---

**[Client general information]**

---

2/1/2012 9:40 James 0 min.

[Notification by email :  
Dear Sir/Madam,  
Your request is currently being processed.  
We thank you for your patience.  
Kind Regards]

Figure 8.5: The *View Ticket Page*, enabling to execute all of ticket-related activities.

## 8.4 Processing a ticket : an example

Once a ticket is created, according to the evolution of the situation, it is possible for you to *act* on the ticket. This *Add Action in Ticket Page* can be accessed via , a button which is available at any *View Ticket Page* (8.5).

Adding an action on a ticket is done whenever you need to change its status or assign it to an other user ; therefore, the action's main purpose is to keep an historical track of everything (status changes, assignments) that has been done in the ticket to solve it.

In the current example, the user (James) that created the ticket has first to declare

the ticket as 'open', and also to conveniently add a description of the problem that client John Smith complained about (Fig.8.6). As seen there, whether the action is billable or not is shown and a duration can be entered ; these two items depend on ticket type (10.2.1). Also, a **red & bold** button allows to place HTML tags that will make the action text appear in such style.

[View Ticket Page] **Add action** :

Comments :	Smith's complaint : Cheddar Cracker box (s/n : Box 2) contained a 'dead bug'. Supplier : Food Corps, Ltd
Status :	Open
<input type="checkbox"/> Email Notification	
<input type="checkbox"/> SMS Notification	
<b>Create</b>	<b>Cancel</b>

Figure 8.6: The 'new' ticket is set to 'open' and also a comment consisting in the problem's description is given for the record.

A notification email is not sent to the complaining client because no meaningful event occurred yet.

As the complaint is about a manufactured product coming from a supplier, Customer Support group member James then decides to forward the ticket to Mary, member of the External Relations group (Fig.8.7).

[View Ticket Page]

[External Relations] Mary **Update assignment**

Figure 8.7: Ticket is forwarded to External Relations group member Mary.

Mary (who had enabled displaying of a 'Customer Support' Event Control, 1.3) then receives the alert that a new ticket has been assigned to her ; she contacts the supplier Food Corps, Ltd and at the same time informs the client that his complaint has been sent (Fig.8.8).

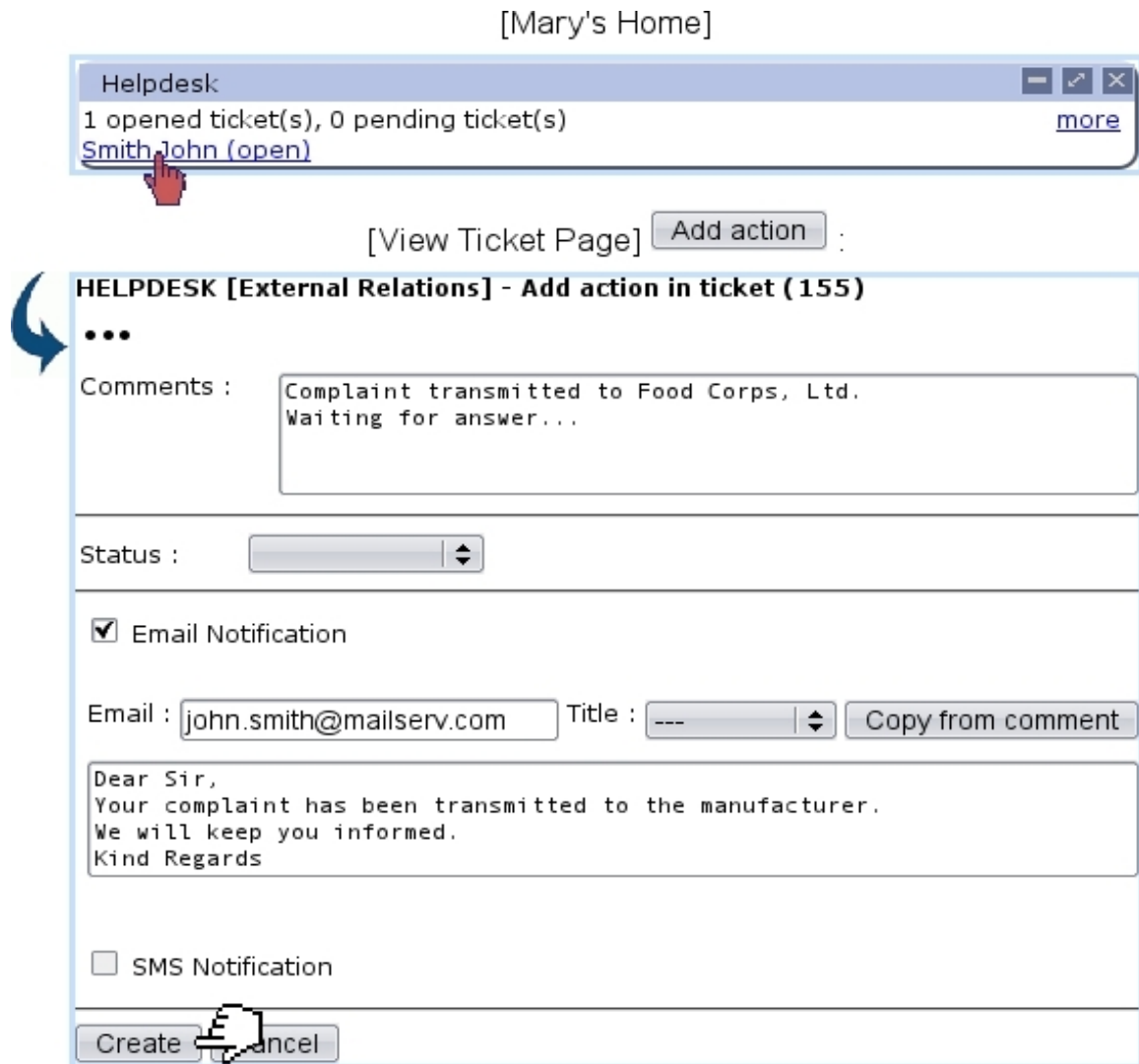


Figure 8.8: User Mary receives ticket and processes it according to her External Relations skills, and also informs client.



The [Copy from comment](#) button as seen on Fig.8.8 can be used to directly put in the Email field what was typed in the 'Comments:' field.

After a while, now with the answer of the supplier, Mary adds another action (comment : "FC Ltd apologized for mishap and reinforced quality controls. Client is proposed free tour of the factory with gifts.") and, as her work here is finished, she assigns the ticket to James, who adds a last comment while sending a final notification to the client and also closing the ticket (Fig.8.9).

[James' View Ticket Page for this ticket]

Comments :


Status :

Email Notification

Email :  Title :

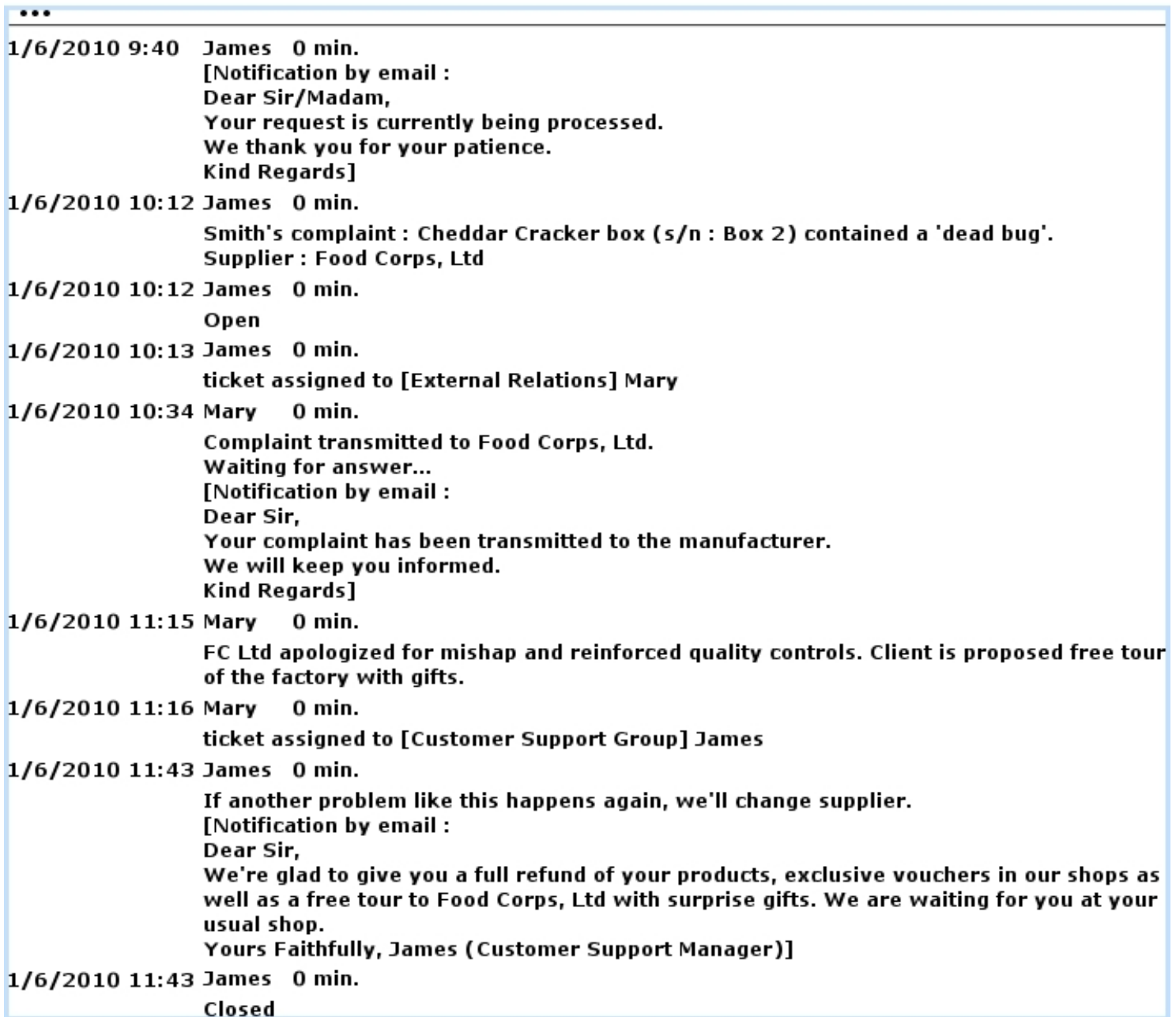
SMS Notification

Figure 8.9: Problem is solved and therefore ticket is closed.

 *To each action, any kind of file can be attached via the  button (provided that related ticket type allows it, 10.2.1).*

Blue Chameleon keeps track of all comments, status changes, notifications email at the bottom of the *View Ticket Page*. This log is useful to follow the solving of a problem from the beginning to the end (thus making faster the solving of ulterior problems of the same kind) and keep records of clients' problems.

For the example above, the full log is shown at Fig.8.10.



1/6/2010 9:40	James	0 min.	[Notification by email : Dear Sir/Madam, Your request is currently being processed. We thank you for your patience. Kind Regards]
1/6/2010 10:12	James	0 min.	Smith's complaint : Cheddar Cracker box (s/n : Box 2) contained a 'dead bug'. Supplier : Food Corps, Ltd
1/6/2010 10:12	James	0 min.	Open
1/6/2010 10:13	James	0 min.	ticket assigned to [External Relations] Mary
1/6/2010 10:34	Mary	0 min.	Complaint transmitted to Food Corps, Ltd. Waiting for answer... [Notification by email : Dear Sir, Your complaint has been transmitted to the manufacturer. We will keep you informed. Kind Regards]
1/6/2010 11:15	Mary	0 min.	FC Ltd apologized for mishap and reinforced quality controls. Client is proposed free tour of the factory with gifts.
1/6/2010 11:16	Mary	0 min.	ticket assigned to [Customer Support Group] James
1/6/2010 11:43	James	0 min.	If another problem like this happens again, we'll change supplier. [Notification by email : Dear Sir, We're glad to give you a full refund of your products, exclusive vouchers in our shops as well as a free tour to Food Corps, Ltd with surprise gifts. We are waiting for you at your usual shop. Yours Faithfully, James ( Customer Support Manager)]
1/6/2010 11:43	James	0 min.	Closed

Figure 8.10: Full history of the current example ticket's solving.

## 8.5 Checking time evolution of ticket-related data

User activities and statistics are the two ways in which Blue Chameleon users can check the quantitative aspects of tickets.

### 8.5.1 User activity

It is possible to check a ticket-wise user's activities at any day via the **Activities** button as found at the bottom of the main *Customer Support Page*. On the then displaying



*Activities Page*, two drop-down menus let you input a specific user and day. Every ticket that has been acted on will be listed (displayed inbetween time gaps of 15 minutes) as a click-link leading to its full description.

Fig.8.11 illustrates this page for user James on the day of the example case above.

## 8.5.2 Ticket statistics

Also available from the main *Customer Support Page*, the **Statistics** button leads to a page shown at Fig.8.12 which will allow you to check ticket statistics by displaying tables featuring ticket types, categories, statuses... Dates inbetween which to check ticket statistics can be chosen, as well as the issuing user group.

Several displays are then available, cleared up below.



*For a user group to appear in the menu, it must be an 'open' group (9.4.1).*

### 8.5.2.1 'Global Statistics:'

It features a table of the total number of tickets, sorted horizontally by their status and vertically by their type (Fig.8.13).

### 8.5.2.2 'Statistics for selected parameter:'

It provides a drop-down menu with the option 'Helpdesk users' and all defined ticket type categories :

- when picking the 'Helpdesk user', a number-of-ticket table sorted horizontally by ticket types (and inside each, by status) and vertically by the issuing users (belonging to the user group as chosen on the top of the page) (Fig.8.14) ;
- when picking a category, a number-of-ticket table sorted horizontally by ticket types (and inside each, by status).

### 8.5.2.3 'Global Statistics - sort by parameters:'

It displays all possible tables described above ('Helpdesk users' and each possible category).

HELPDESK [Customer Support Group] - Activities

Activities by User :  on  Monday 02 January 2012  

Statistics for James - 02/01/2012

9h30	9h45	<p><a href="#">NewTicket (Smith.John)</a></p> <p><a href="#">Ticket (Smith.John)</a></p> <p>Action :  <b>[Notification by email :                      Dear Sir/Madam,                      Your request is currently being processed.                      We thank you for your patience.                      Kind Regards]</b></p> <p>Duration : 0 min.</p>
9h45	10h0	<p><a href="#">Ticket (Smith.John)</a></p> <p>Action : <b>Smith's complaint : Cheddar Cracker box (s/n Box 242) contained a 'dead bug'.                      Supplier : Food Corps, Ltd.</b></p> <p>Duration : 0 min.</p> <p>Action : <b>Open</b></p> <p>Duration : 0 min.</p> <p>Action : <b>ticket assigned to [External Relations] Mary</b></p> <p>Duration : 0 min.</p>
14h0	14h15	<p><a href="#">Ticket (Smith.John)</a></p> <p>Action : <b>If another problem like this happens again                      --&gt; change supplier</b></p> <p><b>[Notification by email :                      Dear Sir,                      We're glad to give you a full refund of your products, exclusive vouchers in our shops and a                      free tour in Food Corps with gifts. We are waiting for you at your usual shop. Yours                      Faithfully, James (Manager)]</b></p> <p>Duration : 0 min.</p> <p>Action : <b>Closed</b></p> <p>Duration : 0 min.</p>

Figure 8.11: A log of James' activity on the day when the example client complaint was issued.

**HELPDESK [Administrator] - Statistics**

From :  Monday 06 December 2010 to :  Sunday 12 December 2010


User group :  ▾

Global statistics :

Statistics for selected parameter :  ▾

Global statistics - sort by parameters

Figure 8.12: From here, ticket statistics can displayed according to date and user groups, with three kinds of tables

Global Statistics :  

	Total	Closed	New	Open	Customer Pending	Event Pending
Nb of Tickets - Customer	3	1	2	0	0	0
Nb of Tickets - Supplier	0	0	0	0	0	0

Figure 8.13: The Global Statistics table.

Statistics for selected parameter :  ▾  :

Users	Total	Customer						Supplier					
		Total	Closed	New	Open	Client pending	Event pending	Total	Closed	New	Open	Client pending	Event pending
James	7	7	4	3	0	0	0	0	0	0	0	0	0
Karen	1	1	1	0	0	0	0	0	0	0	0	0	0
<b>TOTAL</b>	<b>8</b>	<b>8</b>	<b>5</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Figure 8.14: This table sorts tickets by ticket types and issuing user.

Statistics for selected parameter :  ▾  :

Complaint	Total	Customer						Supplier					
		Total	Closed	New	Open	Client pending	Event pending	Total	Closed	New	Open	Client pending	Event pending
<b>TOTAL</b>	<b>72</b>	<b>70</b>	<b>15</b>	<b>0</b>	<b>54</b>	<b>1</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>


Figure 8.15: This table takes interest into a particular category.



# Chapter 9


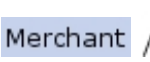
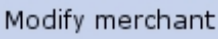
## General Configuration

Blue Chameleon's great advantage is that it can be modeled to suit your needs, whether you wish to use rather the fewest options possible or on the contrary define your own elements in command groups.

All commands explained in this section are accessible from the  command group.

### 9.1 The *Merchant Configuration Page*

The whole system that handles every functionality of Blue Chameleon is called a Merchant, and its configuration rules what is possible to do in every domain (client options, stock matters,...).

According to your needs and the kind of activity your company does, some options may be superfluous. Merchant configuration is performed via  /  / , yielding a page displayed at Fig.9.1. From there, you can shape Blue Chameleon's possibilities according to your needs.

#### 9.1.1 Merchant general information

On Fig.9.2 is displayed as an example what kind of information can be filled in. It is strongly advised that you fill in there your company's head office information, as the Merchant could be considered as the root from which everything is configured. If you have other places such as sale outlets, they will be inputted while creating shops (9.2).

If you have uploaded a Merchant logo picture (9.7.1), it is available in the eponymous menu. It is also advised that user group (9.4.1) Administrator is chosen.



Figure 9.1: The *Merchant Configuration Page*.

### 9.1.2 Merchant addresses

In addition to your company's head office information, you can define other addresses for other local offices, as shown in Fig.9.3.

These alternative addresses are featured on the page where print sets for invoices and reminders are defined (5.5.2.1).

Once defined, this alternative merchant address can be modified in the same page through a menu, and other other ones can be added (Fig.9.4)

### 9.1.3 Client preferences

They are featured in Fig.9.5.

- *Menus* : 'Client logins:'
  - client login can be disabled if you do not grant your clients any access ;
  - 'local logins' ;
  - 'logins through wallet'.
- *Toggles* :
  - client logins ;
  - the distinction between client types can be enabled : if so, while creating a new client (2.1), one new menu ('Type of person:') lets you pick between 'Physical person' and 'Corporate body' and an other one ('Type of client:') between 'Private client' and 'Professional client' ;
  - if the above was enabled, the 'Clients are private/professionals' toggle sets the default choice for the 'Type of client:' menu while creating a new client (which can be modified afterwards) ;

General / Modify merchant / **Merchant general information** :

**Merchant general information**

Name:	Retail Food Company	
Head office:	41, Green Hill Road	
Postal code:	90000	City: Los Angeles
Country:	USA	
Tel:	555 9630	Fax:
Email:	contact@retailfc.com	
VAT number:	VAT-#987654	
Register institute:	TLDR	
Register number:	#452564	
Client order Email:	client.order@retailfc.com	
Backoffice order Email:	backoffice@retailfc.com	
Client reply Email:	client.order@retailfc.com	
Homepage:	http://www.retailfoodcpny.com	
Secure URL:		
Logo image:	Retail Food Company Logo	
Default user group:	Administrator	
<input type="button" value="Modify"/>		

Figure 9.2: Here, set your company's head office general information.

- client account management.

### 9.1.4 Article preferences

They are featured in Fig.9.6).

- *Menus* :

- 'Default article order:' rules how articles are be sorted whenever a list of them is displayed (e.g. when making an order) when <Default merchant order> has been selected for the related category's 'Article order:' menu (3.1.2.2) ;
- if you want to use Blue Chameleon's stock features, it is mandatory that you define the 'Stock management:' drop-down menu as either 'Stock management

**General** / **Modify merchant** / **Merchant addresses** :

**Merchant addresses**

Name:

Address:

Postal code:  City:

Country:  ▾

Tel:  Fax:

Email:

Figure 9.3: Defining other offices.

**General** / **Modify merchant** / **Merchant addresses** :

**Merchant addresses**

Select address:  ▾

Name:

...

Figure 9.4: Modifying alternative address.

**General** / **Modify merchant** / **Client preferences** :

**Client preferences**

Client logins  ▾

Client logins optional  Client logins required

Clients are private  Clients are professionnals

Distinct client types disabled  Distinct client types enabled

Client account management disabled  Client account management enabled

Figure 9.5: Choosing preferences for clients.

by counters' or 'Physical stock management' ; the choice between the two bear consequences on article (3.3.1.4 and article type (3.3.3.2) configurations ;



General / Modify merchant / **Article preferences** :

### Article preferences

Default article sort order:

Article in single category       Article in multiple categories  
 Article file management disabled       Article file management enabled  
 Hide article types       Display article types  
 Article price types disabled       Article price types enabled  
 Article reservation disabled       Article reservation enabled

Stock management

Depreciation disabled       Depreciation enabled  
 Supplier management

Article subscriptions disabled       Article subscriptions enabled  
 Prepaid articles disabled       Prepaid articles enabled  
 Article bundles disabled       Article bundles enabled

Supported article status:

Available  
 Unavailable  
 Hidden  
 Available with quantity indication  
 Available with quantity limitation  
 Ordered  
 Unavailable online

Figure 9.6: Choosing preferences when dealing with articles.

- to enable suppliers (3.6.1.2), choose either 'with optional documents' or 'with required documents' at the 'Supplier support:' menu. The former is to be chosen if you want to be free to register stock entries with (3.6.3.1) or without (3.6.3.2) a supplier document, while the latter is to be chosen if you want to *enforce* the recording of a supplier document for each stock entry.
- *Toggles* :
  - articles may be allowed there to belong to more than one category ; in this case, while creating (3.1.1) or modifying (3.2.1.1) an article, the drop-down menu where the article's related category is picked is replaced by a  button ;
  - enabling 'Article file management' makes a  button appear on the *Article Management Page* (3.2.1) ;
  - article types (3.1.2.1) can be hidden or shown : the former choice makes as if all article types had a 'hidden' visibility (3.3.3.1) ;

- enabling 'Article price types' makes a **Modify special prices** button appear on the *Article Management Page* (3.2.1) ;
  - stock article depreciation (3.6.2) ;
  - subscriptions, prepayments and article bundles, if enabled there, appears, in the 'Usage type:' menu (3.3.1.2) while creating an article.
- *Checkboxes* : article statuses (3.3.1.1) in use are picked from here.

### 9.1.5 Shop and order preferences

They are featured in Fig.9.7.

General / 
 Modify merchant / 
 Shop and order preferences :

**Shop and order preferences**

Shopping	enabled in front- and back-office ▾
Secure connections (FO)	disabled ▾
<input checked="" type="radio"/> Hide "Enter Quantity" field	<input type="radio"/> Display "Enter Quantity" field
<input checked="" type="radio"/> Order quantity unit disabled	<input type="radio"/> Order quantity unit enabled
<input checked="" type="radio"/> Add ordered articles into shopping cart again disabled	<input type="radio"/> Add ordered articles into shopping cart again enabled
<input type="radio"/> Tax not included	<input checked="" type="radio"/> Tax always included
<input type="radio"/> Salespersons disabled	<input checked="" type="radio"/> Salespersons enabled
<input type="radio"/> Gift wrapping disabled	<input checked="" type="radio"/> Gift wrapping enabled
<input checked="" type="radio"/> Delivery at shop without special treatment	<input type="radio"/> Delivery at shop has no payment options
<input type="radio"/> Delivery set management disabled	<input checked="" type="radio"/> Delivery set management enabled
<input type="radio"/> Resellers disabled	<input checked="" type="radio"/> Resellers enabled
Supported order status:	<input checked="" type="checkbox"/> In progress
	<input checked="" type="checkbox"/> Available
	<input checked="" type="checkbox"/> Delivered
	<input checked="" type="checkbox"/> Completed
	<input checked="" type="checkbox"/> Canceled
	<input checked="" type="checkbox"/> In suspense
	<input checked="" type="checkbox"/> Invoiced
Supported ordered article status:	<input checked="" type="checkbox"/> Available
	<input checked="" type="checkbox"/> Ordered
	<input checked="" type="checkbox"/> Unavailable
	<input checked="" type="checkbox"/> Completed

Modify

Figure 9.7: Choosing preferences when ordering.

- *Menus* :
  - 'Shopping' : to be able to make orders (4.1), any other option than 'disabled' must be chosen here ;
  - Secure connections.
- *Toggles* :
  - the shown/hidden "Enter quantity field" takes place during the first steps of an order (Fig.4.1) and lets user freely choose a quantity, otherwise quantity is fixed to 1 or, if applicable, to the one inputed in the 'Order quantity unit' field (see below) ;
  - enabling 'Order quantity unit' will make an eponymous field appear during the creation (3.1.1) or modification (3.2.1.1) of an article ; then, when preparing an order, the ordered quantity will have to be a multiple of that entered quantity, else there will be such a warning : "The article '...' can only be ordered by 3 units. The quantity has been changed from 1 to 3." ;
  - Add ordered into shopping cart again enabled/disabled ;
  - while creating articles (3.1.1) and ordering them (4.1.1), if you want taxes to be calculated afterwards (while at an order) on the basis of the unit price, choose 'Tax not included' ; on the other hand, if you want to input unit prices already containing tax, choose 'Tax always included' :

[Add/Modify Article Page] :	[Add/Modify Article Page] :
Unit price: <input type="text" value="1.00"/> (VAT excl.)	Unit price: <input type="text" value="1.00"/> (VAT incl.)
Tax code: <input style="border: none; border-bottom: 1px solid black;" type="text" value="VAT (20.00 %)"/> ▾	Tax code: <input style="border: none; border-bottom: 1px solid black;" type="text" value="VAT (20.00 %)"/> ▾
[Make Order Page] :	[Make Order Page] :
<b>Total: 1.00 USD (VAT excl.)</b>	<b>Total: 1.00 USD (VAT incl.)</b>
<b>VAT: 0.20 USD</b>	
<b>Total: 1.20 USD (VAT incl.)</b>	

- Delivery at shop without special treatment/Delivery at shop has no payment options ;
- are enabled/disabled there : salespersons (9.6), gift wrapping (4.1.3), delivery method sets (4.5.2), resellers (9.3).
- *Checkboxes* : order and ordered article statuses in use (4.1.5) are picked from here.

## 9.1.6 Invoice and payment preferences

They are featured in Fig.9.8.

- *Menus* :

General / Modify merchant / **Invoice and payment preferences** :

**Invoice and payment preferences**

Invoice management

Payment set management disabled  Payment set management enabled

External account management

Credit control disabled  Credit control enabled

Default credit control class:

Supported payment status:  In progress  Paid


Modify 

Figure 9.8: Choosing preferences related to invoices, payments and credit control.

- 'Invoice management', which apart from being disabled, can be set to either automatic or manual ;
  - 'External account management' menu manages whether/how the External System (6.1) is used : to do so, is necessary to choose any other option than 'disabled'. The 'manual' or 'automatic' options then decide whether invoices and payments are manually exported (6.1.2) or as soon as they are created (6.1.3) ;
  - the default credit control class (5.6.6.1), which in case of a wanted use must be enabled with the toggle, is chosen from the eponymous menu.
- *Toggles* : enable/disable the use of payment method sets (6.4.2) and of a credit control class.
  - *Checkboxes* : payment statuses in use (5.6.1) are picked from here.

### 9.1.7 Miscellaneous preferences

They are featured in Fig.9.9 ; here is set the enabling/disabling of menu custom scripts and system task (9.8) managements.

General / Modify merchant / **Miscellaneous preferences** :

**Miscellaneous preferences**

Menu custom scripts management disabled  Menu custom scripts management enabled

Scheduler tasks disabled  Scheduler tasks enabled

Modify 

Figure 9.9: Enabling or disabling menu custom scripts and system task managements.

### 9.1.8 Currencies

For invoices to be created, a currency must be defined as default. Several currencies are supported (US dollar, Euro,... ), as displayed at Fig.9.10.



Figure 9.10: Defining the currency on which anything related to prices will rely.

### 9.1.9 Countries and languages

Countries you wish to accept orders from (i.e., the list of countries available when adding a client, 2.1) are defined here (Fig.9.11). They are assessed the geographical zones which you have previously defined as tax categories (6.3.1).

The default language in which Blue Chameleon is displayed as well as the supported languages are also set at this page. The checked languages will be then available for users on their *Modify User Page* (9.17), where they can make their individual language choice.

General / Modify merchant / **Languages and countries** :

**Languages and countries**

Countries where orders are accepted from:

<input checked="" type="checkbox"/> Belgium	Tax code category
<input checked="" type="checkbox"/> France	EU
<input checked="" type="checkbox"/> Germany	EU
<input checked="" type="checkbox"/> Great Britain	EU
<input checked="" type="checkbox"/> Luxembourg	EU
•••	•••
<input checked="" type="checkbox"/> Other country	Rest of the world
•••	•••
<input checked="" type="checkbox"/> USA	USA

Supported languages:

<input type="checkbox"/> Dutch
<input checked="" type="checkbox"/> English
<input checked="" type="checkbox"/> French
<input checked="" type="checkbox"/> German
<input type="checkbox"/> Portuguese

Default language: English

Modify 

Figure 9.11: Setting countries from which to accept orders and their zone ; setting language in which Blue Chameleon is displayed *by default*.

## 9.2 Creating shops



*User rights for creating and modifying shop(s) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Shop management

A 'shop' is a sale outlet where clients may pick up their order (4.11) ; at least one shop has to be defined for such orders to be processed.

The process to add a new shop start from **Merchant / Shops** ; there, **Add** leads to what is shown at Fig.9.12.

The following can be defined :

- a previously-uploaded shop logo picture (9.7.1) ;
- the shop's general information ;

Shops /

### Add new shop

Logo:

Name:

Address:

Zip code / City:

Country:

Tel / Fax:

E-mail:

Default client:

Default delivery method:

Default payment method:

Default billing method:

Other:




Figure 9.12: Adding a new shop.

- a default client for this shop, who will serve later as the  as accessed when registering a sale for this shop (4.6.2) ;
- default delivery (4.5.1), payment (6.4.1) and billing (5.4.4) methods.

A shop's data can be modified anytime via [Shops / Shop Name](#) . At the bottom of this page lies also the list of all cash registers that have been created (see below) for this shop, with for each of them the possibility to check its  or to  or  it.

### 9.2.1 Creating a cash register for a shop

One or several "cash register(s)" can be added for each shop (9.2) in the way shown at Fig.9.13.

Each cash register is assessed :

- a name ;
- the shop it will be attached to ;

Merchant / Cash registers / Add new cash register :

**Add a cash register** □ ×

Name:

Shop:

Delivery method:

Payment method:

Billing method:

Account:

Figure 9.13: Creating a cash register named "CR 1" for shop Iguana Food Store.

- a particular "pick up order at shop" delivery method (4.5.1) or <None> or <All pick-up delivery methods> ;
- a particular payment method (6.4.1) or <None> or <All payment methods> ;
- a particular billing method (i.e. invoice delivery method, 5.4.4) or <None> or <All billing methods> ;
- a cash-box account (6.2.3).

A cash register can also be created on the shop's own page, i.e. via [Shops](#) / [Shop name](#)  / .

Once a cash register is created, it becomes possible to register sales (4.6) through it.

## 9.3 Creating resellers



*User rights for managing resellers can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Reseller management

Resellers, only if enabled while at the *Merchant Configuration Page* (9.1.5), are defined via [Merchant](#) / [Reseller](#) / , as shown in Fig.9.14.

Once created, it is possible to edit a reseller's information via [Reseller](#) / .



Merchant / Reseller /

**Add new reseller**

Reseller name:

Contact person:

Address line 1:

Address line 2:

Address line 3:

Postal code:  City:

Country:

Telephone number:  Fax:

E-mail address:




Figure 9.14: Adding a new reseller.

## 9.4 User groups and users

The defining of these is better done with your Admin account.

### 9.4.1 Creating user groups

According to the needs and components of your company, it is possible to define user groups, for instance one for your accounting group, another for your sales group... User groups in themselves do not grant rights, as they are only defined by a user's rights. It is to note that the same user can belong to more than one user group.

To be created, from **Users / User groups** as shown in Fig.9.15, a user group has to hold at least one user called the default user.

Also, the 'Accessibility:' menu provide the choice to declare this user group as closed or open.

### 9.4.2 Users

People of your company who are *individually* granted access to Blue Chameleon are called *users* ; each one of them possess a single username and password.

### 9.4.3 List of users and login information

Fig.9.16 features how the list of Blue Chameleon users is shown.

Users / User groups / Add new user group :

### Add user group

User group:

Accessibility:

Default user:

Attached users

- admin
- Dick
- Harry
- James
- Jane
- Karen
- Mary
- Tom

Figure 9.15: Adding the new user group 'Customer Support Group'.

General / Users / Users :

### View users

User status:

Login	Name	User group	Last login		
<a href="#">admin</a>	Jones Jack	Administrator	27/5/2011 12:02	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
<a href="#">bobzmu</a>	Zmuda Robert	Customer Support Group	27/5/2011 8:30	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
<a href="#">Dick</a>	Malone Richard	Sales Department	30/5/2011 7:25	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
<a href="#">Harry</a>	Robbs Harry	Sales Department	1/6/2011 9:22	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
<a href="#">James</a>	Sawyer James	Customer Support Group	26/5/2011 15:32	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
<a href="#">Jane</a>	Kovács Jane	Accounting	27/5/2011 09:26	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
<a href="#">Karen</a>	Winston Karen	Accounting	1/6/2011 13:02	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
<a href="#">lavereau</a>	Lavereau Dwayne	External Relations	27/5/2011 12:43	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
<a href="#">Mary</a>	Russell Mary	External Relations	26/5/2011 14:27	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
<a href="#">Tom</a>	Hanson Thomas	Sales Department	30/5/2011 8:59	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>

Figure 9.16: The *User List Page*.

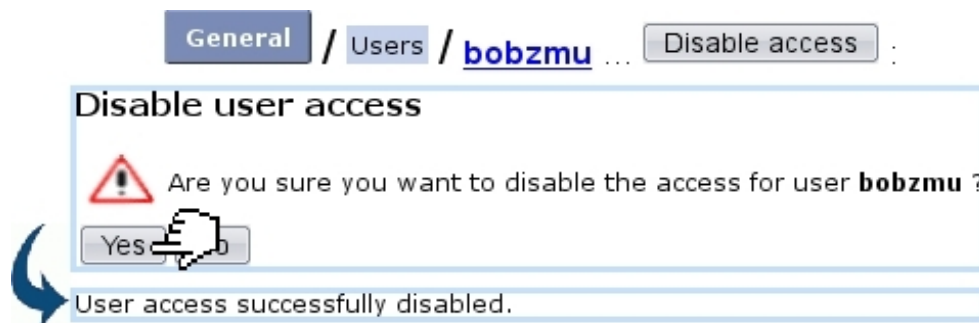
There, a menu provides a specific user status along which to search users : enabled/disabled users, or all of them. Also, it is possible from here to add a new user (9.4.4).

By clicking **Search**, a user list is then displayed with the following data/actions for each user :

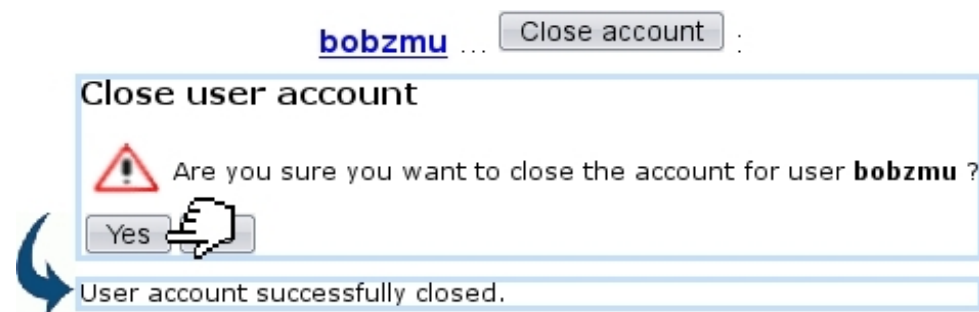
- username, as a click-link to her/his *View User Page* ;
- full name and user group ;
- last login date ;
- a **Modify** button leading to her/his *Modify User Page* (Fig.9.17) ;
- according to the status of the user, various buttons to perform actions related to user access to Blue Chameleon (9.4.3.1).

#### 9.4.3.1 Disabling access to users, closing their account

A user that has access to Blue Chameleon is said to be enabled ; in that case, as it was seen on Fig.9.16 above, a button to **Disable access** of user to shop is available, so that if user leaves the company, s/he cannot access Blue Chameleon anymore ; all her/his user rights will be indeed set to 'None'.

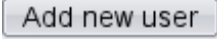


In order to flag a user whose access has been disabled as definitely out, it is possible then to **Close account** of user.

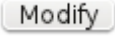


## 9.4.4 Creating users

The number of user accounts that can be created depends on your subscription. As a rule, one particular user called 'admin' is already defined by default.

The creation of a user is achieved via the  button as found on the previously-illustrated *User List Page*, leading to a page where user is configured, information- and right- wise. This page is identical to the one detailed below.

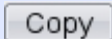
## 9.4.5 Configuring users

User data can be configured during user creation, or afterwards via the  button as found on the *User List Page*.

Apart from the user's general information such as user name, password, name, etc., it is possible to define for him/her :

- one or several user group(s) (9.4.1) s/he belongs to ;
- a default user group ;
- a preferred language, chosen from the customized list of Blue Chameleon's supported languages as set at the *Merchant Configuration Page* (9.1.9) ;
- the type of menu (12) as well as its orientation ;
- a default or specific 'cash register transition' account (6.1.1) ;
- if applicable for this user, a supplier (3.6.1.2) and/or a reseller (9.3).



*As the list of rights to be set is long and you might not be familiar with all of them, it is advised that you  the rights from admin and after a while, set them individually according to what this user is allowed to do or not (see 11 for greater details about user rights).*

*The ability to set a user's rights and manage them is itself ruled under the element :*

**User management**

General / Users / Users / **Tom** Modify

### Modify user

Copy user rights from other user: admin

Copy Merge Reset

---

Username:

Password:

Retype password:

Name:

First name:

Tel/Mobile:

E-Mail:

Notification: by Email

Default user group: Sales Department

User groups:

- Accounting
- Administrator
- Customer Support Group
- External Relations
- Sales Department

Language: English

Menu: Standard menu

User menu orientation: vertical

External cash-box transition account: <Default>

Supplier: <none>

Reseller: <none>

User rights:	Owner	All
User management:	<span>Delete/Create/Modify</span>	<span>Delete/Create/Modify</span>

**[List of User Rights]**

Modify

Figure 9.17: Configuring Tom's user account, and assessing his rights temporarily from admin.

## 9.5 Service level agreement (SLA)



*User rights for generally managing service level agreements can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Credit control and SLA management

A service level agreement (SLA) is a predefined class of service that is attributed to a client, so that clients may be gathered into different groups. Most of them would be labeled, SLA-wise as 'normal', but it is possible to upgrade some very important clients into a distinctive class labelled as 'priority', for instance, or 'urgent'.

Service level agreements intervene while dealing with tickets (8.2.1) : there, the 'Priority:' (8.2.5) menu contains all SLAs that have been defined. By default, the one that is preselected is the one that had been assessed to the related client on her/his page (2.2.3).

As illustrated in Fig9.18, a new service level agreement can be added through

General

/ Merchant / Service level agreements / Add new service level agreement

Merchant / Service level agreements / Add new service level agreement

**Add service level agreement**

Level:

Label:

Comment:

Min. general user right level:

Min. owner user right level:

Figure 9.18: Creating a 'Normal' SLA class.

The SLA level decides how priority this service level agreement will be, and thus how high tickets given that priority will appear in the Tickets table (Fig.8.4). For instance, a SLA labelled 'Normal' can be assessed a level of 1, another labelled 'Priority' a level of 2, and a 'Urgent' one a level of 3.



The user right level menu as seen on this page relate to the 'Commercial access level:' as set on the Modify User Page (Fig.9.17) : in order to assess this SLA to a client, her/his commercial access levels will have to be equal or higher than the levels as set while defining the SLA. Therefore, the higher the levels are assessed to the SLA, the more protected it will be : this will for instance prevent too-high statuses and ticket priorities from being given carelessly.

Fig.9.19 thus shows 'Normal', 'Priority' and 'Urgent' defined SLAs.

Merchant / Service level agreements :	
Level	Label
1	<u>Normal</u> <input type="button" value="Modify"/>
2	<u>Priority</u> <input type="button" value="Modify"/> <input type="button" value="Remove"/>
3	<u>Urgent</u> <input type="button" value="Modify"/> <input type="button" value="Remove"/>

Figure 9.19: 'Normal', 'Priority' and 'Urgent' service level agreements have been created and are now available to be assessed to ticket priority.

## 9.6 Salesperson management



User rights for managing salespersons (adding, commissions,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element

### Salesperson management

#### 9.6.1 General managing of salespersons

Mainly appearing as the ones who register an order, 'salespersons' are nonetheless an option, which must be activated (9.7). They are defined through **Merchant / Salespersons / Add new salesperson** ; there, as shown in Fig.9.20, a new salesperson is assessed :

- a reseller (9.3) ;
- an already existing user (or none) ;
- a status (active/hidden/inactive) ;
- a commission set (9.6.2) (or none) ;
- default or specific 'salesperson' and 'counterpart' external accounts (6.1.1).

Merchant / Salespersons / Add new salesperson :

**Add new salesperson**

Salesperson name:

Reseller:

User:

Status:

Commissions:

External account:

External counterpart account:

Figure 9.20: Adding a new salesperson, who is already a user.

## 9.6.2 Commissions and commission contracts for salespersons

Inside Blue Chameleon, commissions can be defined for each article and, as illustrated in Fig.9.21, the following data is inputed :

- a commission contract (9.6.2.1) this commission will belong to ;
- a specific article category, or none ;
- a specific article, or all articles ;
- two amounts in shop's currency (9.1.8) corresponding to first and next periods ;
- for subscriptions with consumption (3.7.4), an amount on it and the duration of the commission.

### 9.6.2.1 Commision contracts

Commissions can be gathered into sets called 'commission contracts', which can be used to particularize the commission of a salesperson (see above). For instance, Fig.9.22 shows the defining of a commission set.

Afterwards, commissions added to this contract/unattached ones can be removed/added by unticking/ticking the checkboxes as seen when modifying this contract :



### Add commission

Commission contract: Phone services

Category: RFS Hot Line / RFS HotLine 800

Article: At-Home Help, basic

First period on article : 0.1 USD

Next periods on article : 0 USD

Commission on consumption : 0 USD

Commission duration: 1 months


Add 

Figure 9.21: Adding a commission for article 'At-Home Help, basic'.

### Add commission contract

Name: Phone services

Add 

Figure 9.22: Adding a new commission contract.

### Modify commission contract

Name: Phone services

Add new commission

<input checked="" type="checkbox"/> Article/Category	Retail price VAT incl.	First period	Next periods	Consumption
<input checked="" type="checkbox"/> <a href="#">RFS Hot Line/ RFS HotLine 800- At-Home Help, basic</a> <i>At-Home Services / At-Home Services</i>	100.00	0.10 USD	0.00 USD	0.00 USD
<input checked="" type="checkbox"/> <a href="#">RFS Hot Line/ RFS HotLine 800- At-Home Help, basic</a>	100.00	0.10 USD	0.00 USD	0.00 USD

Modify

## 9.7 Illustrating Blue Chameleon elements with your images



*User rights for image management (creating, viewing, assessing,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Image management

It is possible to render Blue Chameleon visually nicer by uploading images, especially for articles.

#### 9.7.1 Viewing and managing images

Images are generally managed through **General** / **Miscellaneous** / **Images**, where, as shown on Fig.9.23, it is possible to see them according to their context of use and upload some, according to their future use. Indeed, the 'Image type:' menu decides the use this image is aimed at :

- article type (3.1.2.1) and category (3.1.2.2) (which effects can be seen at Fig.4.1) ;
- icon (i.e. for an article, which can also be uploaded on the *Modify Article Page*, see below) ;
- merchant and shop logos, as chosen afterwards on their dedicated pages (9.1.1 and 9.2).

Thanks to the 'Width:' and 'Height:' fields (in pixels), it is possible to resize the image. If they are set to 0 or left blank, image will be displayed in its original size.

Once uploaded, images can be viewed via **Images** / **View images**, where it is also possible to **Modify** (i.e. change their width, height and description) or **Remove** them.

#### 9.7.2 Adding an article image

Amongst all elements that can be assessed a picture, articles provide the possibility to upload directly an image on their very page, as featured on Fig.9.24, while creating (3.1.1) or modifying (3.2.1.1) an article, thanks to the **Add image** or **Add icon** buttons. Then, for instance on the *Article Management Page* (3.2.1) or when ordering this article, the icon or image will be displayed.

It can be noted that, for the same article, several images or icons can be uploaded ; then, on the *Modify Article Page*, drop-down menus for icon and image will let you select

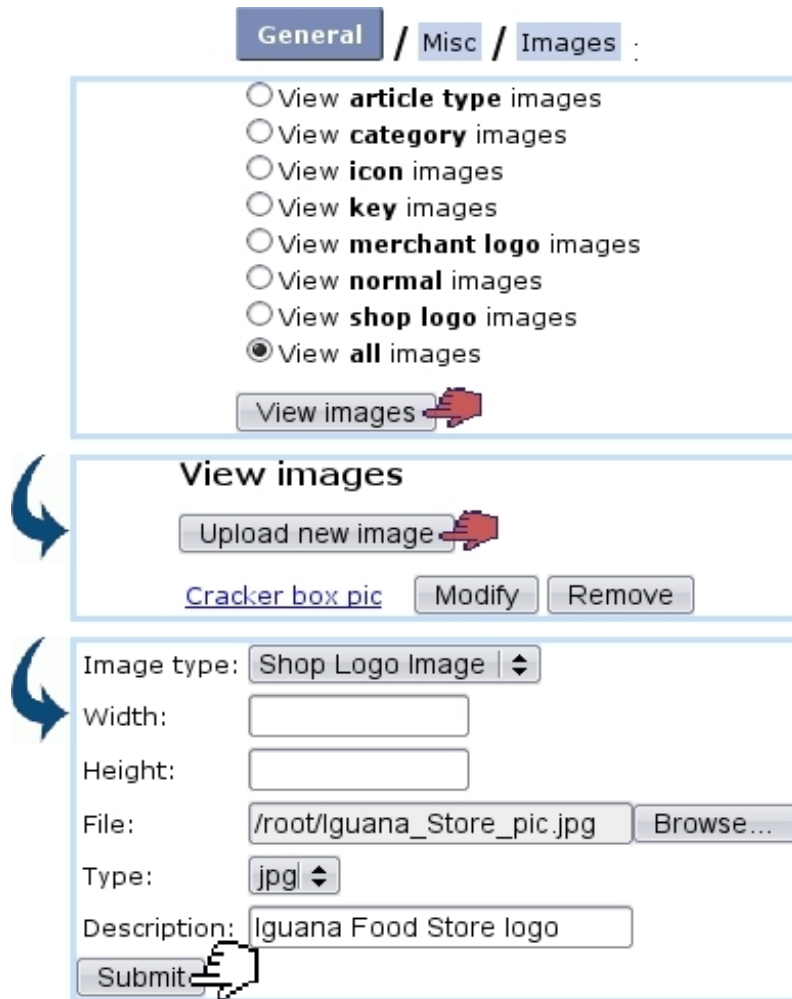


Figure 9.23: Viewing current images and uploading one to be used in this example as a Shop logo.

the one(s) you wish.

The difference between the icon and image is that, if both are defined, it is the icon picture that will be displayed. If just one of them is defined (or the other set to 'none' on its menu) then it will be displayed, whether icon or image.

[Create/Modify Article Page]  :

**Upload icon image**

If you want the image to be displayed in its original size, you don't have to fill in the Width and Height field. If Width and Height are all 0, the image will also be displayed in its original size.

Width:

Height:

File:

Type:

Description:

[Article Management Page] :

**Cheddar Crackers Box**

**Article type:** Snacks

**Category:** Crackers

**Unit price:** 1.00 USD

**Usage type:** Normal

**Invoices:** Complete invoices for this article

**Stock article:** Cheddar Crackers Box (1 in stock)

**External account:** <Default>

**Credit note account:**

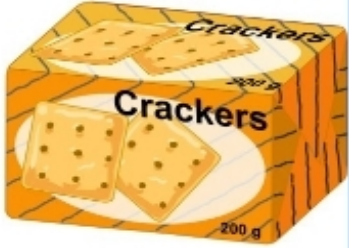


Figure 9.24: Adding an icon for an article.

## 9.8 System task management



*User rights for managing system tasks (handling, closing, scheduling,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

### Task management

Through use of Blue Chameleon, actions called system tasks are sometimes triggered, for instance :

- scheduler task (9.8.2)
- export to external system (6.1.2)

- export problem report (6.1.2.1)
- validation of temporary invoices (3.7.2.2)
- calculation of outstanding amounts (5.6.6.2)
- reading of a domiciliation return file (5.10.7)
- sending of a print set (5.5.5)
- filling of a domiciliation batch (5.10.6.1)

They are displayed on the "Task Manager" event control (provided that it had been enabled, 1.3) as illustrated as on example on Fig.9.25 ; for each of them, the date and time at which they have been launched is shown, as well as, when achieved, the date at which they have ended. Also, a percentage shows the progress of the system task, and if applicable, it can be clicked on to show its details.

For details to be accessed and, more generally, to manage system tasks, the 'Scheduler tasks' must be enabled while at the *Merchant Configuration Page* (9.1.7).



Figure 9.25: The system task manager event control, showing one running task and one finished ; accessing the details of the latter.

Once achieved, while on its details page, it is possible to  the system task to remove it from the event control.

### 9.8.1 Executed system tasks

Whether system tasks have been started, have finished or have been closed, the list of them is accessible through **General** / **Personalization** / **Task management** / **Executed tasks**, where, as displayed in Fig.9.26, menus allow to refine search by system task type and status.



Figure 9.26: Viewing system tasks pertaining to temporary invoice validating that have been closed.

Similarly as for the "Task Manager" event control (Fig.9.25), clicking on a system task name allows to access its details and, if finished, to close it.

### 9.8.2 Scheduler tasks

The above concerns system tasks that are launched punctually by a user ; Blue Chameleon also allows particular scripts to be automatically executed at set times and dates and with a defined frequency or none.

The management of these scheduler tasks is done, as illustrated in Fig.9.27, via a weekly calendar accessed through **General** / **Personalization** / **Task management** / **Task scheduler**.

After having selected the right day and time interval, it becomes possible to **Add new scheduler script** as shown on Fig.9.28.

Once added, a scheduler script is displayed in the scheduler calendar ; as shown on Fig.9.29, upon click, it is possible to check every detail of it and if needed **Modify** it, as well as executing it thanks to the eponymous button.

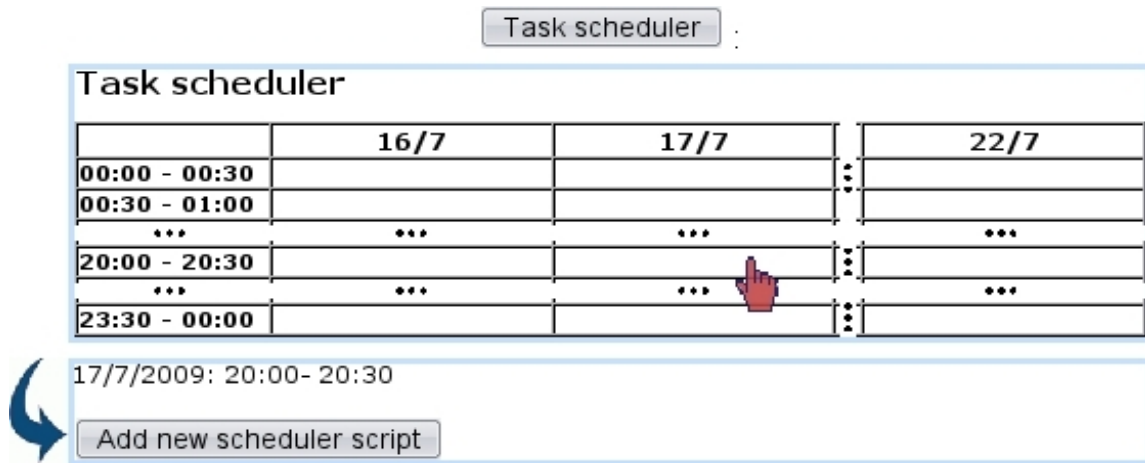


Figure 9.27: Selecting a day and a time interval to schedule tasks.

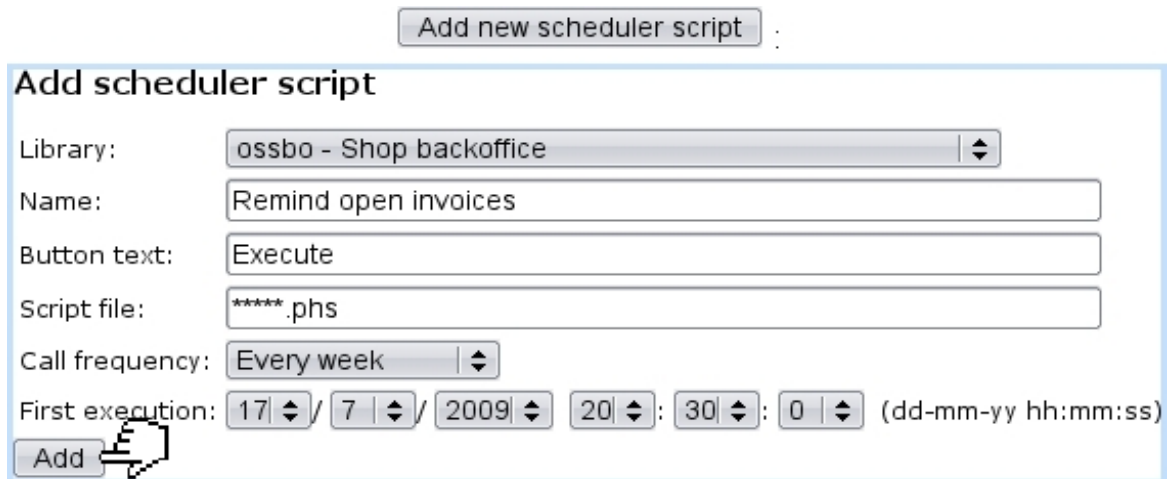


Figure 9.28: Building a scheduler task that consists in weekly calling in the script to remind open invoices.

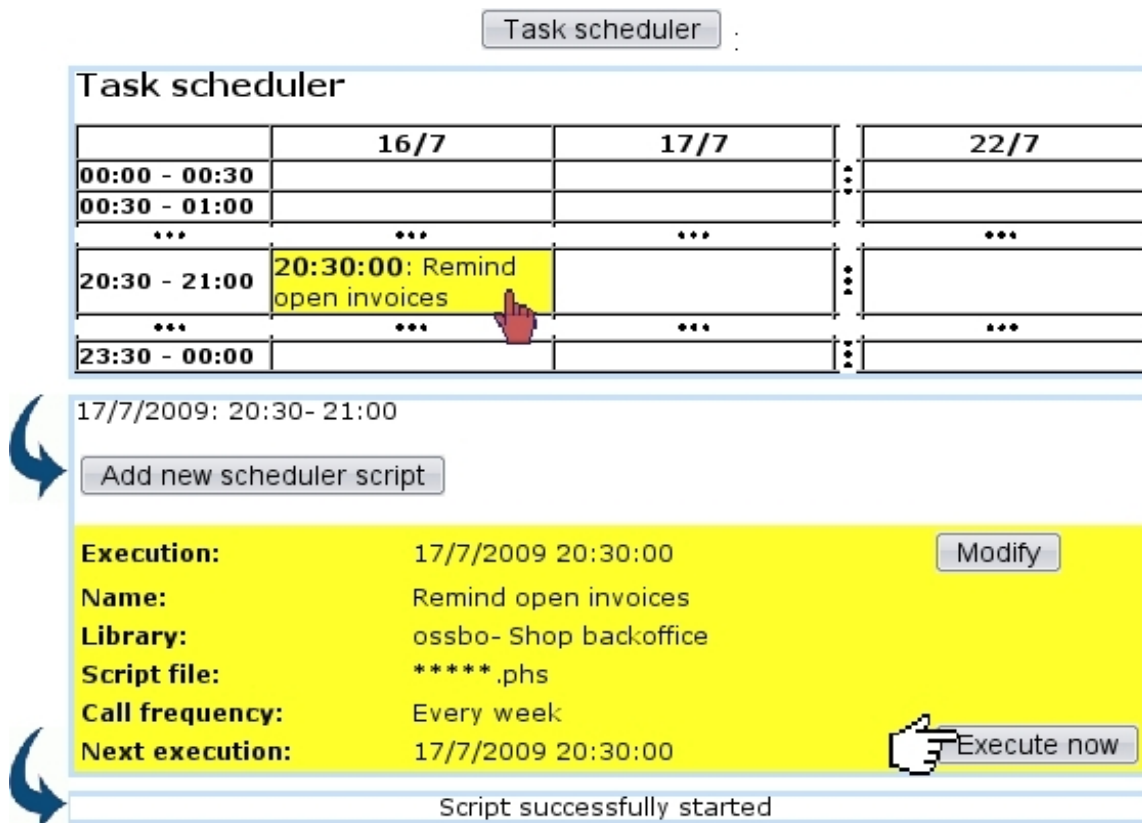


Figure 9.29: Launching the (weekly) execution of a scheduler script.



# Chapter 10

## Ticket issuing prerogatives and administration

The user that creates a ticket belongs to a user group (9.4.1) which may be set to issue only a certain type of tickets, according to the functions you define this user group to stand for ; moreover, the user's rights can also be set in order to rule her/his view options and forward capabilities.

This principle enables to quicken ticket creation as well as most importantly to avoid bad ticket forwards to user groups that do not have the skills to process them.

It must be strongly pointed up that the rights of a user are *only* defined by her/his user rights, not her/his belonging to a user group, as this structure does not grant rights.

All of this is accomplished thanks to the ticket administration tools, which are accessed via **Add-ons** / **Helpdesk** / **Administration** . Then, as pictured in Fig.10.1, the Administration menu shows five buttons whose functions are cleared up below.

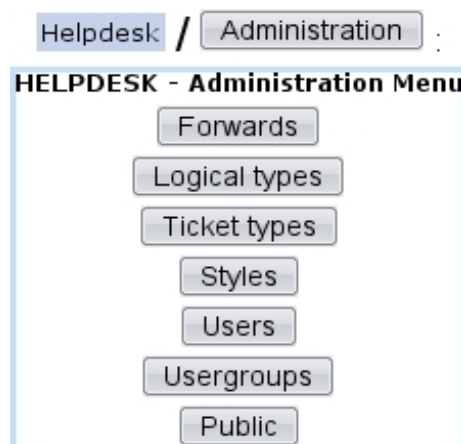



Figure 10.1: The Ticket administration menu.

## 10.1 The *Forwards Administration Page*

This page is accessed via **Forwards**. Should a user be missing for a while, its utility is to forward all the tickets this user will receive from a start date and time to an end date and time to other users.

For instance, user Harry, member of the 'Sales Department' user group, will be missing for one week and his tickets will be forwarded to user Dick. At the page accessed via **Forwards**, user Harry is picked and then the start/end dates and times inbetween which forwarding will be active are chosen.

A list of the user group(s) Harry belongs to is also displayed (Sales Department) with a drop-down menus designed to choose one other user of that group to whom tickets will be forwarded, Dick for that matter. The process is summed up at Fig.10.2.



The screenshot shows a web interface for forwarding tickets. At the top, there is a 'Forwards' button, a dropdown menu with 'Harry' selected, and an 'Ok' button. Below this is a form titled 'HELPDESK - Forward administration'. Inside the form, there is another 'Harry' dropdown and an 'Ok' button. The 'Start' date is 'Monday 25 October 2010 - 08:00' and the 'End' date is 'Monday 08 November 2010 - 08:00'. The 'Sales Department' dropdown is set to 'Dick'. At the bottom of the form are 'Ok', 'Cancel', and 'Delete' buttons.

Figure 10.2: Forwarding tickets for Sales Department user Harry to same user group member Dick, for two weeks.

## 10.2 The *List of Ticket Types Page*

Ticket types allow you to group your tickets into clusters in order to render searches more accurate and to have a clearer stand upon your company's activities. Via **Ticket types**, as displayed at Fig.10.3 are displayed current ticket types.

### 10.2.1 Creating ticket types

While on this page, click on **Add type** to define a new ticket type. As Fig.10.4 shows, general informations and properties are first given :

- **General** :
  - a name for this new ticket type

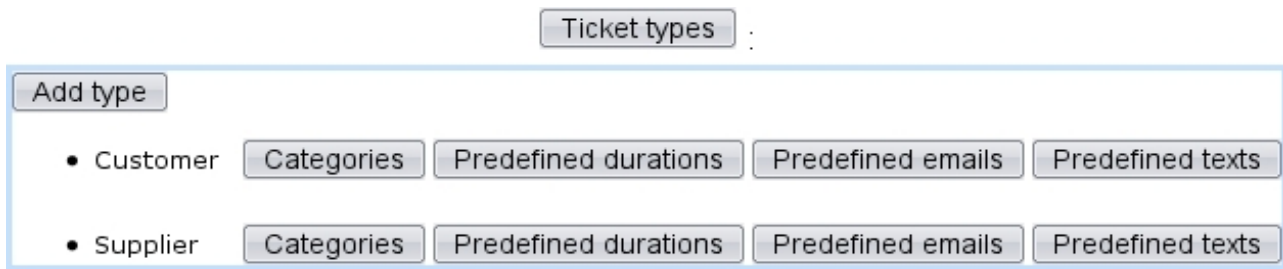


Figure 10.3: The *List of Ticket Types Page*, allowing to make ticket genres as accurate as possible.

- 'Base ticket type :' : decides whether this new ticket type is based on a pre-existing one, in which case all the following fields are disabled ;
- whether tickets of this type can have their ticket type modified ;
- the style for this ticket type (10.3) ;

• **Properties** :

- whether tickets of this type will force the selection of a client or it is optional ;
- whether tickets of this type will have a priority ('none', 'view' : ticket's priority is read-only, 'modify') ;
- visibility : permits to choose if a ticket of this type will always remain private or public (i.e. for back-office only or both front-office and back-office), or will be subject to be changed from one state to the other anytime ;
- whether tickets of this type can be created in Front-Office ;
- whether the duration (8.2.4) is proposed or not, or optional, or predefined (10.2.2.4) ;
- whether actions for tickets of this type can be billed ;
- whether a file can be added when doing an action on tickets of this type ;
- notification : choosing 'none' removes the possibility to send a notification email (10.2.2.2) to the client, 'free' allows it, 'forced' makes it mandatory.

Other data can be configured at the bottom of the page, as featured at Fig.10.5 :

- Access ;
- Supervisor management ;
- SLA notification.

Once a ticket type has been created by clicking on **Create** at the bottom of the page, this new type is listed at the previous *Ticket Types Page*. Six buttons on the right of the name of ticket type allow then to act on it. The two rightmost buttons, **Modify** and **Delete** (not featured on Fig.10.3) respectively enable to modify the type's properties as they are shown above and completely remove the ticket type.

Add type :

**HELPDESK - New Ticket Type**

Name :

Base ticket type :

Optional client :

Duration :

Style :

Ticket priority :

Notification :

Ticket visibility :

Figure 10.4: Main data for new ticket type 'Customer', aimed at client complaints.



After a ticket type has been created, its *Edit Ticket Type* page as accessible through **Modify** features two new fields :

- 'Billable action', deciding whether actions related to this ticket type will be billed or not ;
- 'Creation enabled', deciding whether this ticket type will be available for manually-created tickets, as opposed to automatic tickets created by the shop : for the former case, **this must be set to yes**.

## 10.2.2 Going further into ticket type configuration

Ticket types offer more options to shape them to precise needs.

### 10.2.2.1 Categories and parameters for a ticket type

On the *Ticket Types Page* (10.3), the leftmost button, **Categories**, allows to make ticket description better. For instance, we could want a ticket of the Customer type (as created above) to be split into two kinds, 'product' and 'service' in order to make distinction between complaints about faulty products and complaints about quality of service. To fulfill this wish, a Complaint category could be created, holding the two parameters 'Product' and 'Service'.

This is provided by the *Categories Page*, accessed by clicking on foresaid button. The

**Access**  
 Default access level : 0  
 Modify access level : no

**Supervisor management**  
 Supervisor : none  
 Supervisor always different than ticket creation user : no  
 Ticket always closed by supervisor : no

**SLA Notification**  
 Notifications : no  
 Supervisor SLA level : Normal  
 Salesman SLA level : Normal  
 Shop user SLA level : Normal

Create Cancel

Figure 10.5: Other data to configure a ticket type with.

simple process of creating a new category (whose only property is its name) is then shown at Fig.10.6 on the left. Afterwards, on this page, categories are displayed as list, and for each of them, modifying (which is just a name change for that matter) and removing are possible thanks to the eponymous buttons.

Finally, the leftmost button of this page, **Parameters**, allows you to define parameters in the way illustrated at Fig.10.6 on the right.

Another example would be for instance concerning tickets of a 'Supplier' type ; a 'Problem' category could then be defined, embracing the parameters 'Quality' and 'Delivery'.

### 10.2.2.2 Predefined emails

As shown in Fig.10.7, a predefined email is added via **Predefined emails** / **Add email**.

Once it has been created, it is possible to view your text in a pop-up window, modify it (similarly as above) or delete it by clicking the eponymous buttons. **Add other language**

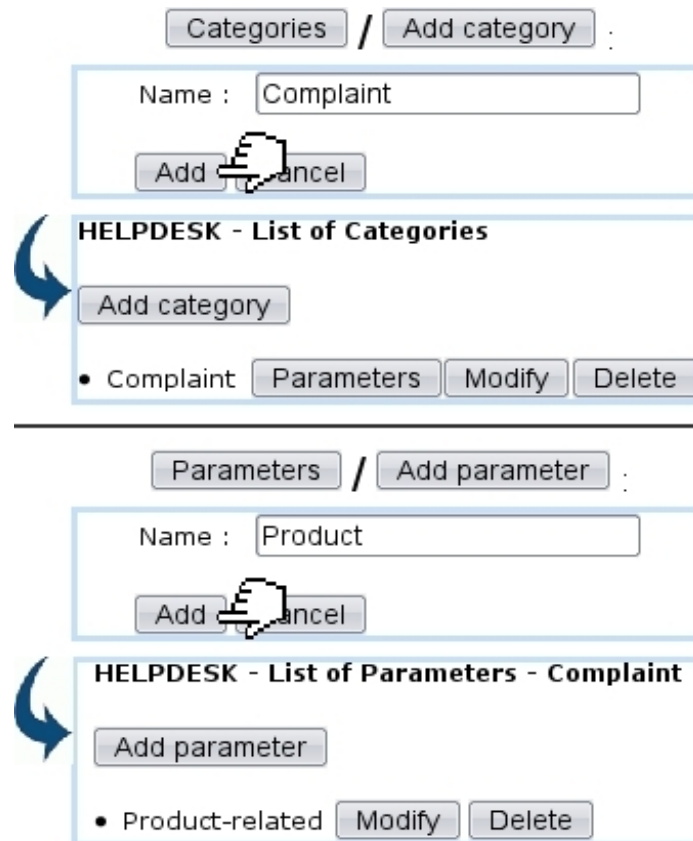


Figure 10.6: (Left :) Creating the 'Complaint' category for the 'Customer' ticket type ; (Right :) creating the 'Product' parameter for the 'Complaint' category.

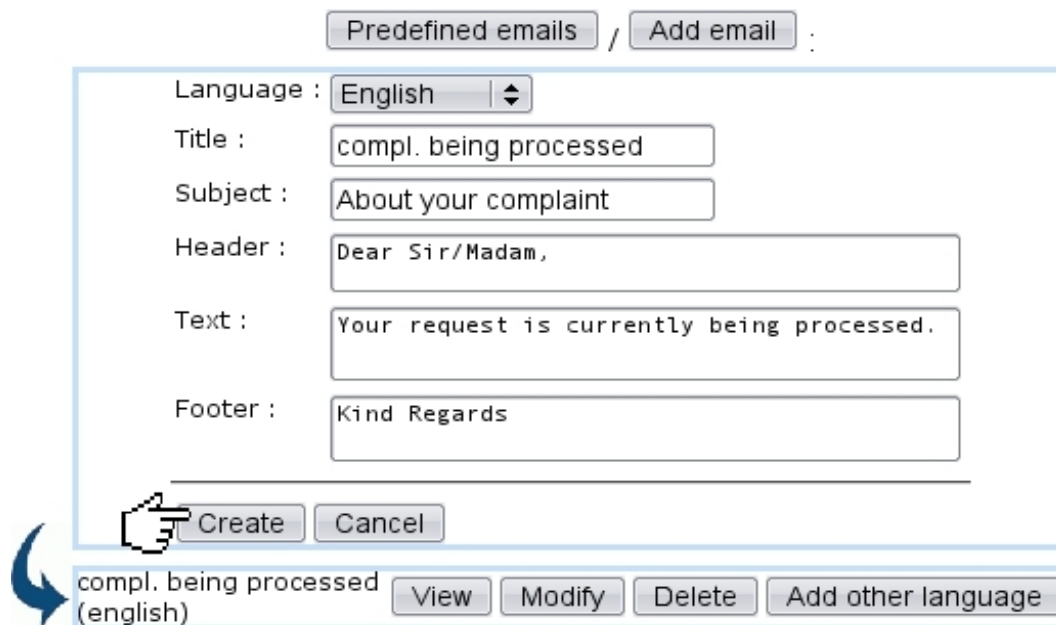


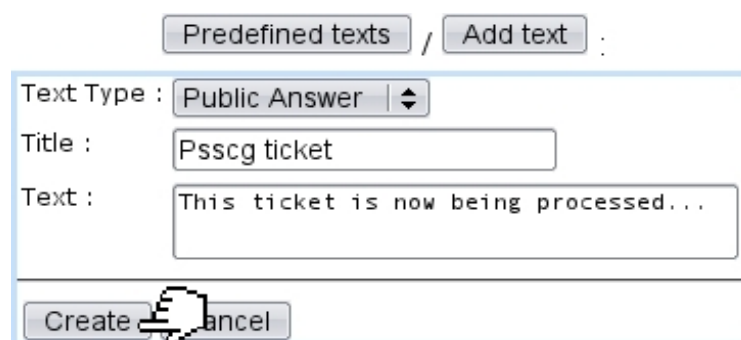
Figure 10.7: Creating a predefined email to the client meaning that the her/his request is being processed.

lets you create a text of the same text type and title, but in another language ; indeed, the language drop-down menu lets you pick any language in which the text has not yet been written.

This predefined email can be then called if a notification email is to be sent while at adding an action (8.4).

### 10.2.2.3 Predefined texts

As shown in Fig.10.8, it is possible to define models of public answers via **Predefined texts** / **Add text**. There, a title under which you want your text to appear is filled in, and so is the text itself.



The screenshot shows a dialog box titled "Predefined texts" with a sub-button "Add text". The form contains the following fields:

- Text Type :** A dropdown menu with "Public Answer" selected.
- Title :** A text input field containing "Psscsg ticket".
- Text :** A larger text input field containing "This ticket is now being processed...".

At the bottom of the dialog, there are two buttons: "Create" and "Cancel". A mouse cursor is pointing at the "Create" button.

Figure 10.8: Creating a predefined public answer meaning the ticket is being processed.

Once created, with similar buttons as for predefined emails, such a text can be viewed, modified, deleted or redone in an other language.

### 10.2.2.4 Predefined durations

As featured in Fig.10.9, the eponymous button allows to define durations (8.2.4) to be used while creating a new ticket. For that matter, the relevant ticket type must have its 'Duration:' menu (10.2.1) set to 'predefined'.

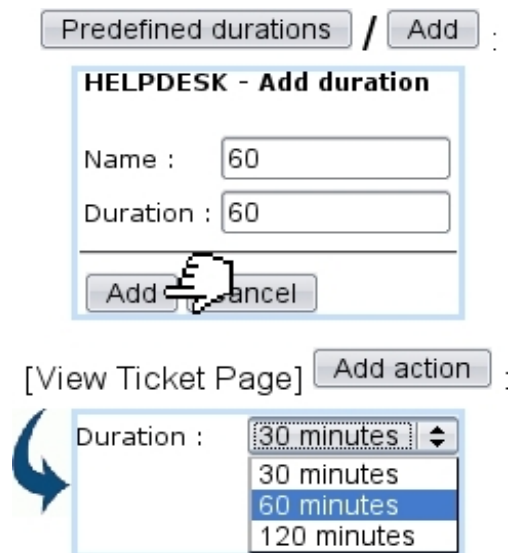


Figure 10.9: Creating a predefined ticket duration of one hour. After, when adding an action, this duration will be readily available at the 'Duration:' menu.

## 10.3 The *List of Ticket Styles Page*

A ticket style is an attribute of a ticket type ; creating a different ticket style for each ticket type is therefore useful to distinguish between them when they are listed in the main *Customer Support Page* (Fig.8.4).

On the *Styles Page* as accessed via **Styles**, the creation of a new style is achieved via **Add style**, in a process shown at Fig.10.10. Here, we create a style aimed for tickets of the "Supplier" type.

Then, four colours are to be filled, using the Color pop-up as seen in 7.2.2.2 :

- 'BGColor (Default) :' : in the Ticket Table, the default background color of tickets belonging to this type ;
- 'Font color (Default) :' : the default font color of this ticket, both in the Ticket Table and in the *View Ticket Page* (8.3.3) ;
- 'BGColor :' : an optional background color for this ticket type ;
- 'Font color :' : an optional font color for this ticket type.



These two optional colors can be used to make an individual ticket stand out from the others of the same type (see below, Fig.10.12). Thus, for convenience, it is advised to choose the optional colors pretty similar to the default ones, but a little darker.

Lastly, font size can be defined with a drop-down menu and its style (bold/italic/underlined) via tick boxes.

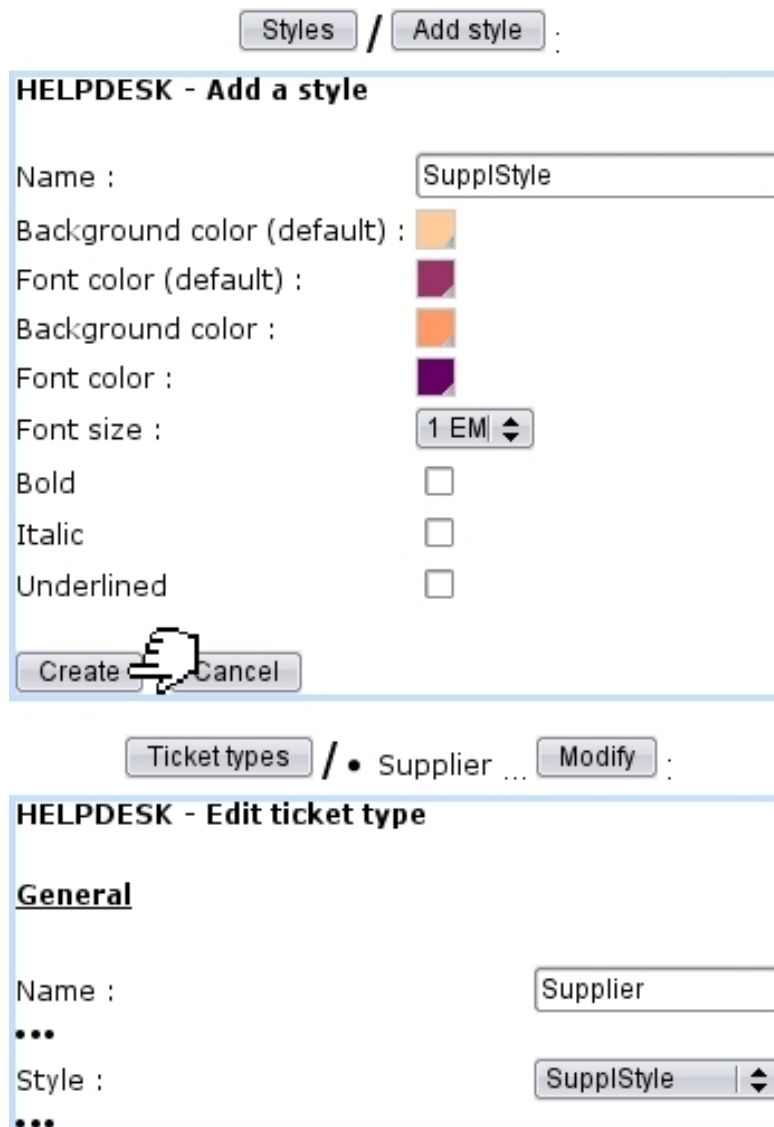


Figure 10.10: Creating a new ticket style, aimed for the "Supplier" ticket type ; it is then assessed to this type through the ticket type's page.

The very result of the ticket style of this example is shown at Fig.10.11.

### 10.3.1 Emphasizing on a certain ticket

By default, on the *View Ticket Page* (8.3.3), the 'Display:' and 'Font:' items are ticked to **default** :

Helpdesk / Type : **Supplier** | Search :

Last modification	Client	Parameter	Start	Priority	
18/2/2011 11:22	<a href="#">Vega Food, Inc</a>	Quality	15/2/2011 9:58	Prioritary	<a href="#">View</a>

Figure 10.11: A ticket of the "Supplier" type, appearing with the style as defined at Fig.10.10.

Display :  **default**  
 Font :  **default**

thus displaying the Default background and font colors as defined at the ticket style creation. It is then possible to untick one or them (or both) to switch to the optional colors. As shows Fig.10.12, this makes this particular ticket stand out amongst tickets of the same type.

[View Ticket Page : "Supplier" ticket for Food Corps, Ltd.]

Display :  **default**  
 Font :  **default**

Helpdesk / Type : **Supplier** | Search :

Last modification	Client	Parameter	Start	Priority	
22/2/2011 14:33	<a href="#">Food Corps, Ltd</a>	Delivery	21/2/2011 10:26	Urgent	<a href="#">View</a>
18/2/2011 11:22	<a href="#">Vega Food, Inc</a>	Quality	15/2/2011 9:58	Prioritary	<a href="#">View</a>

Figure 10.12: Unticking the 'default' boxes for a particular ticket switches the style to the optional colors and afterwards, in the Ticket Table, makes it be distinguished from the others at a glance.

## 10.4 The *User Details Page*

On this page as accessed via **Users** and featured in Fig.10.13, a drop-down menu lets you choose the user of whom you want to see the details, Customer Support-wise ; clicking on **Go** will then bring you to a page where you can see and modify :

- the user's options, mainly for Customer Support main page displaying ;
- the user's view mode and assignment mode rights for all user groups ;
- the ticket types the user can see, for every user group this user belongs to.

All of these options are explained below.

Users / Helpdesk User : Mary | Go

**Style for Helpdesk User Mary :**

Internal Messenger :  No  Yes  
 Email :  No  Yes  
 Menu View :  None  Search Criteria  Client Search  
 Priority Edit :  No  Yes

Ok

---

**Rights :**

	View Mode	Assignment Mode
Accounting	Yes	Yes
Administrator	Yes	No
Customer Support Group	Yes	Yes
External Relations	Yes	Yes
Sales Department	Yes	Yes

Ok

---

**Ticket Types :**

Accounting <any>  
 External Relations <any>

Ok

Figure 10.13: The ticket configuration for a user, mostly ruling view/assignment ticket rights.

### 10.4.1 Style for user

On this first part, four choices are made :

- if yes or no you want warnings to be sent to the selected user by email ;
- the main *Customer Support Page* (as illustrated at Fig.8.1) Menu View : no search menus at all and no **New ticket** button ('None'), just drop-down search menus ('Search Criteria'), or all search menus (drop-down ones and client search) and **New ticket** button ('Client Search') ;
- the Priority Edit : if yes or no the selected user can modify the priority (8.2.5) of a ticket.

### 10.4.2 Rights for user

This part consists in a list of user groups, and for each of them, two Yes/No drop-down menus for View Mode and Assignment Mode. Click on  for these two choices to be validated.

For instance, for a user group G :

- setting View Mode to 'No' will prevent the selected user from seeing any ticket created by any user from G ; but, if the creating user also belongs to another group for which 'Yes' has been set, the ticket will be displayed anyway ;
- setting Assignment Mode to 'No' will prevent the selected user from assigning a ticket to any member of G.

### 10.4.3 Ticket types for user

This part's aim is to decide if the selected user can see any ticket type for the user group(s) she/he belongs to, or just the default one. Indeed, a given user group holds one or several predefined ticket style(s) (for details, see *User Groups Page* below).

Only the user groups the selected user *belongs to* are listed, and for each of them, a drop-down menu lets you pick between 'any' and 'default' ; for instance, if user group G holds three ticket styles (one default, and two others), setting to 'any' will enable the selected user to see all of the three ticket types.

## 10.5 The *User Groups Page*

As illustrated at Fig.10.14, all user groups (9.4.1) are listed ; in order to set which ticket types a user group will be able to issue, click on . On the subsequent page, all ticket types already authorized to the user group will be listed ; if you wish to add another, pick it from the drop-down menu, which conveniently lists tickets types not yet added. Then click on  to validate your choice.

If you want to remove a ticket type from this user group, click on the corresponding  button. The  button marks the ticket type that will be pre-selected in the 'Type:' while at ticket creation.

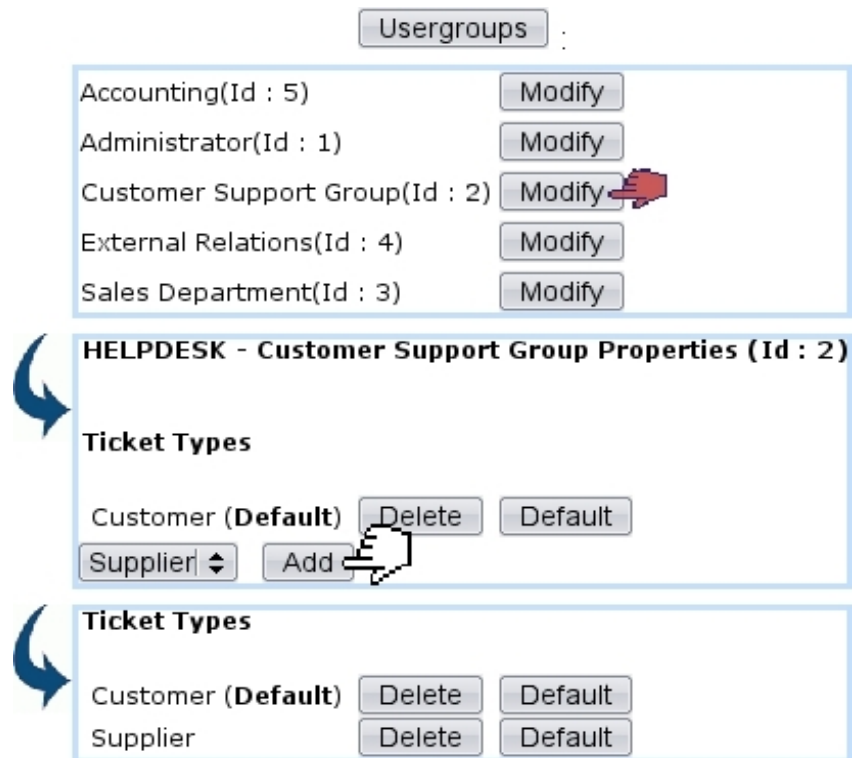


Figure 10.14: Giving to the Customer Support user group the possibility to issue tickets of the 'Supplier' type.

## 10.6 Logical types (In Development)

## 10.7 Public (In Development)



# Chapter 11

## Setting user rights

Some Blue Chameleon components might be of no use to some users ; what is more, actions they could take (such as deleting, modifying some database elements) from these components might even be detrimental to the whole. In order to regulate access to Blue Chameleon function, users are assessed rights (gathered into main groups, 11.3) for every aspect of Blue Chameleon.

Most conveniently, user rights are be accessed via the *Modify User Page* (9.17).

### 11.1 User right basics

For each component, rights are defined in two ways : one right for **Owner** and an other for **All**, which are respectively the rights the user has on his/her own things and on all other users' things, all pertaining to this specific component.

Most user rights inside Blue Chameleon can be assessed the one of the following values :

- 'None' : user doesn not even see anything related to this component ;
- 'View' : user only sees this component appear and is able to browse it ;
- 'Modify' : user is able to edit pre-existing data on this component ;
- 'Create/Modify' : the above and user is able to add data there ;
- 'Delete/Create/Modify' : user is able to accomplish any data-related action ;
- 'Unrestricted' : all rights above, adding to that this user is authorized to take actions that are administrator-only.

#### 11.1.1 Other kinds of user right values

These levels allow to gradually grant the access to particular objects selectively by users.

### 11.1.1.1 Article ordering

The 'Article ordering level:' menu contains 'Front-office and back-office level 0', 'Backoffice level 1' to '...level 4' and 'Unrestricted'. Its role is to allow or not users to register orders on certain articles. Indeed, the category page provides a similar menu (3.3.4.2.1) : for articles related to this category to be ordered by a user, this user's right will have to be equal to or higher than the one that is set for the category.

### 11.1.1.2 Privacy access

The 'Privacy access level' contains values from 'Level 0' to '... 5'. Its role is to rule whether a user has the right to modify/act on certain objects.

The user's privacy access level has to be equal to or higher than the one defined for :

- a property (7.6.2.1), in order for her/him to update it ;
- an document uploaded through the Paperwork manager (7.7), in order for her/him to view or attach other documents to it.

### 11.1.1.3 Commercial access

The 'Commercial access level:' menu contains 'Level 0' to '... 5' and 'Unrestricted'. Its role is to rule whether users are allowed or not to assess to a client a service level agreement (9.5), which is defined using similar levels.

This user's commercial access level has to be equal to or higher than the ones that are were set for the SLA in order to :

- attribute a SLA to a client while her/his creation (2.1) or modifying (2.2.3) ;
- assess the corresponding ticket priority (8.2.5).

### 11.1.1.4 Financial access

The 'Financial access level:' menu contains 'Level 0' to '... 5' and 'Unrestricted'. Its role is to rule whether users are allowed or not to modify a credit control class (5.6.6.1), which is defined using similar levels. For a credit control class to be updated, this user's financial access levels will have to be equal to or higher than the ones that are were set for the credit control class.

The multitude of financial access levels enable to really fine-tune the managing of credit control.

## 11.2 Viewing and modifying user rights

The list of all Blue Chameleon user rights components can be displayed and set in several ways ; for instance, concerning user Tom :



- via the *Modify User Page*, i.e. **General** / **Users** / **Users** : by clicking on the **Modify** button right besides **Tom**, the list of rights as briefly featured at Fig.9.17 is displayed and then can be set individually, for **Owner** and for **All** ;
- or via the dedicated *Modify Right Page* as accessible via **General** / **Users** / **User rights**.

The latter way is more efficient as user rights for all users can be set at the same time. An example of it is given at Fig.11.1 below : there, we select the 'Payment Management' user right from the drop-down menu and upon **Search** click, the current **Owner/All** rights pertaining to payment management are displayed for all users. The 'admin' user is assessed unrestricted rights, while members of the 'Sales Dept.' (Tom, Dick and Harry) and 'Accounting' (Mary and Jane) user groups are assessed the highest rights (Delete/Create/Modify) for a non-'admin' user. By safety, the two remaining users are assessed only view rights.

**General** / **Users** / **User rights** :

**Modify user right**

User right:

User	Owner	All
admin	<input type="text" value="Unrestricted"/>	<input type="text" value="Unrestricted"/>
Dick	<input type="text" value="Delete/Create/Modify"/>	<input type="text" value="Delete/Create/Modify"/>
Harry	<input type="text" value="Delete/Create/Modify"/>	<input type="text" value="Delete/Create/Modify"/>
James	<input type="text" value="View"/>	<input type="text" value="View"/>
Jane	<input type="text" value="Delete/Create/Modify"/>	<input type="text" value="Delete/Create/Modify"/>
Karen	<input type="text" value="View"/>	<input type="text" value="View"/>
Mary	<input type="text" value="Delete/Create/Modify"/>	<input type="text" value="Delete/Create/Modify"/>
Tom	<input type="text" value="Delete/Create/Modify"/>	<input type="text" value="Delete/Create/Modify"/>

Figure 11.1: For the 'payment management' component, users are assessed different rights according to their role in the company.

### 11.3 List of user rights

On the *Modify User Page*, user rights are gathered into different categories, in the following succession :

- the so-called *User rights* : (11.3.1) ;
- *Menu script user rights* : (11.3.2) ;
- particular rights pertaining to add-ons (11.3.3).

### 11.3.1 General *user rights*

As displayed under *User rights* ;, they rule the **management rights** to various basic Blue Chameleon functionalities.

### 11.3.2 *Menu script user rights*

They rule the **access** to Blue Chameleon's general tools and add-ons :

- News (7.1) ;
- Agenda (7.2) ;
- Alarms (7.3) ;
- File manager (7.4) ;
- Customer Relationship Manager (7.9), Projects / Timesheets (7.10) and Human Resource Manager (7.11) ;
- Helpdesk (8).

### 11.3.3 Rights pertaining to add-ons

They are displayed under :

- *OGA user rights* (6.5.1.1) ;
- *CRM user rights* (7.9.1) ;
- *Project / Timesheets user rights* (7.10.1) ;
- *HR Management user rights* (7.11.2).

# Chapter 12

## Main Menu personalization

The Main Menu is not static : it can be modified to suit the specific needs of users. The configuration of the Main Menu is accessed via **Options** / **Main menu** and then choosing the menu you want to modify (as default 'Standard menu') : you will be brought to the *Menu Management Page* for this very menu, as featured on Fig.12.1.

There, command groups are listed, with for each a series of buttons aimed to manage them.



Figure 12.1: The *Menu Management Page* enables to accomplish any menu personalization.



User rights for menu management (rearranging, creating submenus,...) can be set up either at the *Modify User Page* (Fig.9.17) or the *User Right Page* (11.2) under the element

## Menu management

### 12.1 Command group names

Command group names, on the *Menu Management Page*, appear by default in three languages, as separated by a semicolon, in the following order : English, French and German. For instance "Sales;Ventes;Umsatz". The language in which they ultimately appear in the menu bar is the that has been selected at the *Merchant Configuration Page* (9.1.9).

Those names can be changed at your convenience, respecting the language order. Any modification on a name field you would like to make has to be validated by clicking on the corresponding **M** button.

### 12.2 Command group displacement

Command groups appear at the Main Menu in the same order (from the left to the right) as they are listed (from the top to the bottom) on the *Menu Management Page*. To move a command group before its predecessor , click on the corresponding **U** button. To perform the inverse move (after its follower), click on the **D** button.

### 12.3 Displaying sub-(...)-menus and procedures

This task is achieved via **A**. All command groups except **Home** and **Logout** break down into submenus and even sub-submenus for some of their elements. As shown in Fig.12.2, clicking on the **A** button display those (along a drop-down menu enabling to add a new menu or procedure).

Name modifications as well as displacements then work in the same way as cleared up above, and also, if it exists, the displaying of a sub-submenu.

It can be seen on this Fig. that the elements displayed by clicking on 'Misc's **A** button do not provide themselves a **A** button, but a **Murl** : that is because these elements are procedures, which means that they **lead to a screen and not another submenu**.

As a matter of fact, the **Home** and **Logout** command groups are indeed procedures, as they directly induce an action on behalf of Blue Chameleon.

[Menu Management Page]

The screenshot displays a menu management interface. The top section shows a grid of menu items, each with a text field containing multiple language translations and a set of action buttons (M, S, U, D, A). A red hand cursor is shown clicking the 'A' button for the 'General' menu item. Below this, another 'A' button for the 'Miscellaneous' menu item is also highlighted. The bottom section shows a navigation pane with a tree view of the menu structure, where 'General' is expanded to show its sub-items: Merchant, Users, Personalization, and Miscellaneous. The 'Miscellaneous' item is further expanded to show its own sub-items: Delivery methods, Delivery sets, Payment methods, Payment sets, Taxes, Token, and Images.

Home;Accueil;Startseite	M	S	U	D	Murl
General;Général;Allgemeine	M	S	U	D	A
Merchant;Commerçant;Händler	M	S	U	D	A
Users;Utilisateurs;Benutzer	M	S	U	D	A
Personalization;Personnalisations	M	S	U	D	A
Miscellaneous;Divers;Verschiedenes	M	S	U	D	A
Delivery methods;Modes de livraison	M	S	U	D	Murl
Delivery sets;Sets de livraison	M	S	U	D	Murl
Payment methods;Modes de paiement	M	S	U	D	Murl
Payment sets;Sets de paiement	M	S	U	D	Murl
Taxes;Taxes;Mehrwertsteuer	M	S	U	D	Murl
Token;Jetons;Token	M	S	U	D	Murl
Images;Images;Bilder	M	S	U	D	Murl
Articles;Articles;Artikel	M	S	U	D	A
Clients;Clients;Kunden	M	S	U	D	A
Sales;Ventes;Umsatz	M	S	U	D	A
Add-ons;Suppléments System	M	S	U	D	A
Options;Options;Optionen	M	S	U	D	A

Figure 12.2: (Top :) First clicking on 'A' besides 'General' displays its sub-menu, then clicking on 'Misc's 'A' displays the menu it itself contains. (Bottom :) Following that path shows the actual result of that structuring.



# Chapter 13

## The Document Editor

Blue Chameleon integrates a document editor which provides the most useful functionalities of a word processor : text formatting, table and image insertion,... It is used in the context of writing paper creation for invoices, Customer Relationship Manager campaigns and mailings.

### 13.1 General use

General use of Blue Chameleon's Document Editor, which view is featured at Fig.13.1, is pretty similar with that of other word processors.

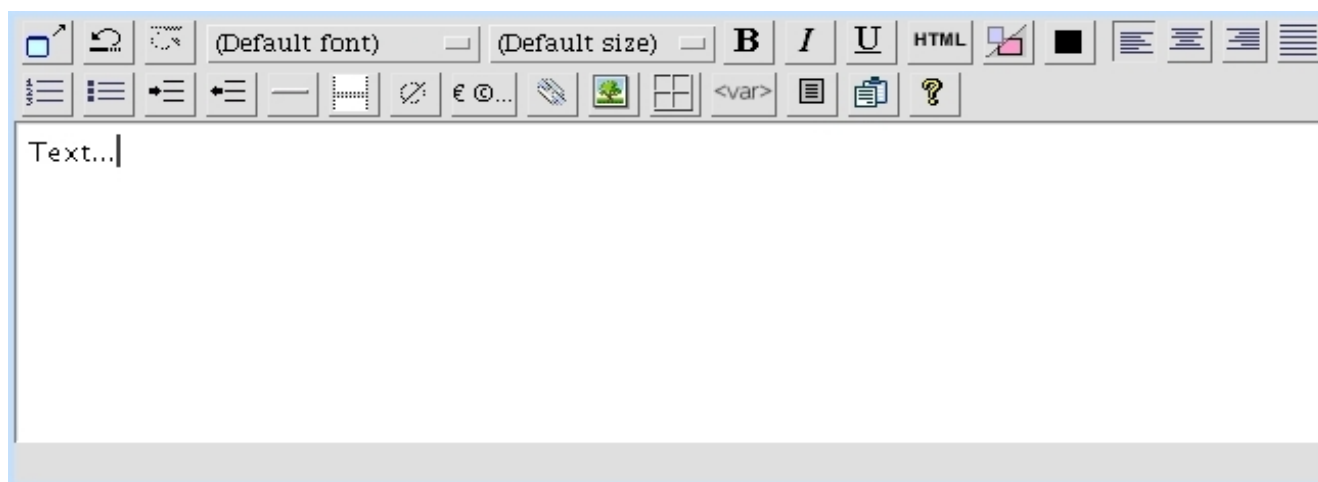




Figure 13.1: The Document Editor.

The Editor window can be put in full screen with  ; normal mode is switched back on again with the same button.

#### 13.1.1 Edition : undo, copy, paste...

In order to undo the last keystroke or operation, click on  ; redoing a canceled keystroke or operation is then achieved via . Usual keyboard shortcuts for these,

respectively Ctrl+Z and Ctrl+Y, are also functional.

Copying or cutting are done by selecting the object to operate on (highlighting a text (Fig.13.2), selecting a table (Fig.13.11)), doing a right click and clicking on **Copy** or **Cut**. Once copied, an element can be pasted via a right-click and **Paste**.

To paste text from another application, click on **Paste** as found in the menu : then, on subsequent pop-up, paste your text via a Ctrl+V and validate by **paste to applet**.

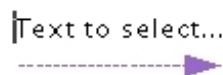
## 13.1.2 Text

How text in the Editor is dealt with in any possible way is described below.

### 13.1.2.1 Highlighting text

As illustrated on Fig.13.2, in order to operate on a piece of text (copying, cutting, moving...), it is necessary to highlight it by positioning cursor in front of it, holding left mouse button and dragging across the text.

hold left mouse button, and drag across text :



...text is highlighted and thus selected.

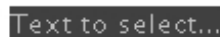


Figure 13.2: Highlighting text.

### 13.1.2.2 Font and font size

The font of inputed or highlighted text is chosen via the **(Default font)** button, which then takes the name of selected font from the following choices as available in Fig.13.3.

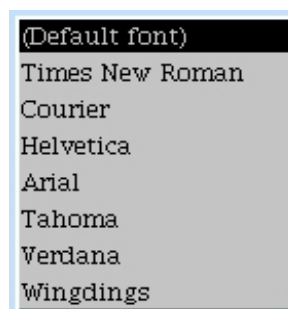


Figure 13.3: List of the Editor's available fonts.



Font size of inputed or highlighted text, as chosen from **(Default size)**, ranges from :

- sizes from 6 to 16 points (by increments of 2) ;
- default size minus 7 to plus 7 ;
- Headings from 1 to 6 ;
- HTML from 1 to 7.

### 13.1.2.3 Font style

Inputed or highlighted text is emboldened, slanted and underlined via respectively **B**, **I** and **U**.

### 13.1.2.4 Font color

Font color of inputed or highlighted text can be chosen via **■**, as displayed on Fig.13.4 ; on the then displaying pop-up window, color can be picked on a palette, or be entered RGB- or hexadecimal- wise via **Other colors...**.

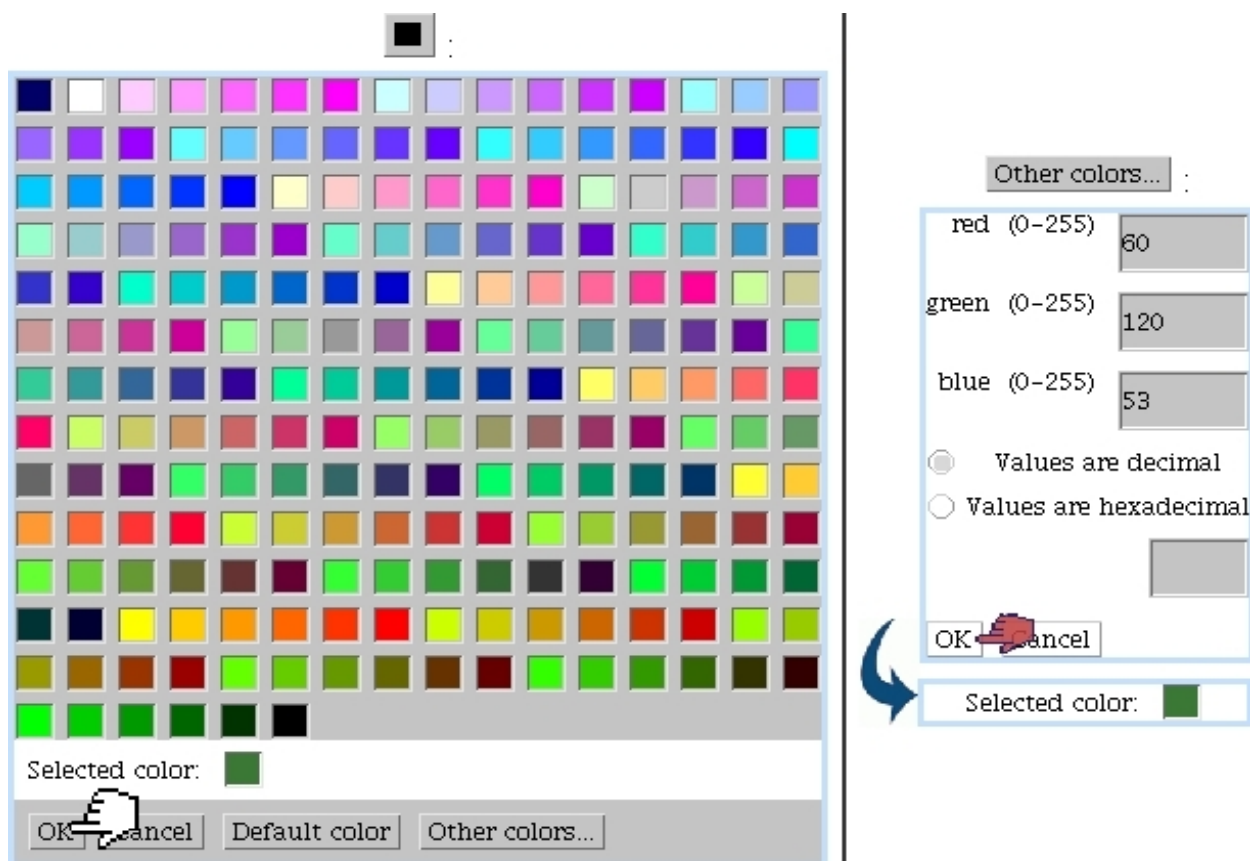



Figure 13.4: Creating and selecting a custom color.

### 13.1.2.5 Alignment and indentation

Inputed or highlighted text can be left-aligned, right-aligned, centered and justified via respectively , ,  and .

Indented or unindentation is achieved via respectively  and .

### 13.1.2.6 Special characters




As represented on Fig.13.5, they are accessible via .



Figure 13.5: Available special characters.


The last used special character added can be directly added again by clicking on the  icon, which takes the appearance of that character.


### 13.1.2.7 Miscellaneous

A horizontal bar, spanning over the whole page, can be added via .

Forcing a page break on a generated PDF can be achieved with .

### 13.1.2.8 HTML code and comments

The Document Editor gives you the possibility, if needed, to input some HTML code (or label highlighted text as so) via .

Also, by clicking , inputed or highlighted text is marked as comment (and thus appears on a grey background) and will not appear on the final document.

### 13.1.2.9 Hyperlinks

Should it be needed, as, featured on Fig.13.6, text can be highlighted and transformed into a clickable link (e.g. to link to a webpage) ; this applies for electronic campaigns (7.9.8).

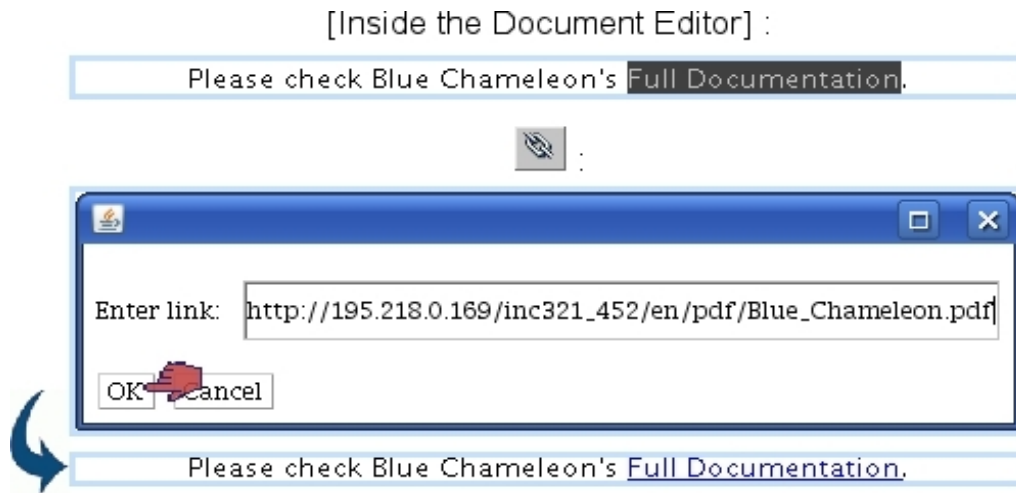




Figure 13.6: This bit of text, when related document will be dispatched as an electronic campaign, is clickable and leads to the entered website.

### 13.1.3 Lists

Bulleted lists and enumerated lists can be entered via respectively  and . As Fig.13.7 shows with the example of an enumerated list, next item of the list is entered by hitting Enter ; to do a line feed without creating a new list item, hit Shift+Enter.

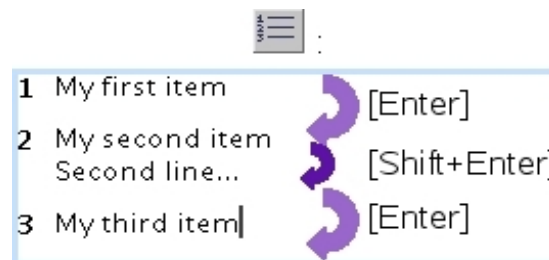


Figure 13.7: Creating an enumerated list.




Fig.13.8 now shows how to build complex plans with embedded sections. The  icon is clicked on as many times as needed to get the aimed number, in this example three times to get **1.1.1**. Hitting Enter then creates the **1.1.2** part. Hitting Enter again, then , tells that this (temporary) part **1.1.3** is in fact a subdivision of the part above, and thus the **1.1.2.1** is created.

Fig.13.9 finally shows how go up in the plan's hierarchy. Enter is hit, then Backspace is hit as many times as needed to get to the "bigger" parts : twice in this example, to shift (temporary) **1.1.2.3** to **1.2**.

### 13.1.4 Tables

A table is added via  ; on subsequent pop-up, as displayed on Fig.13.10, numbers of rows and columns are chosen. Table is then displayed in the Editor and cursor can be



 [Thrice] :  
**1.1.1** Sub-sub-section|  
 [Hit Enter] :  
**1.1.1** Sub-sub-section  
**1.1.2** New sub-sub-section|  
 [Enter] and  once :  
**1.1.1** Sub-sub-section  
**1.1.2** New sub-sub-section  
     **1.1.2.1** Paragraph|




Figure 13.8: An example on how to use the advanced plan possibilities.

**1.1.1** Sub-sub-section  
**1.1.2** New sub-sub-section  
     **1.1.2.1** ...  
     **1.1.2.2** ...|  
 [Enter] and [Backspace] twice :  
**1.1.1** Sub-sub-section  
**1.1.2** New sub-sub-section  
     **1.1.2.1** ...  
     **1.1.2.2** ...  
**1.2** |

Figure 13.9: How to climb up the plan's hierarchy.

placed in a cell via a single left click of the mouse.

#### 13.1.4.1 Selecting a whole table vs. selecting cells

In order to copy/paste/cut a table or align it (with , , ) , it has to be selected as a whole, in the way described at Fig.13.11 : position cursor on its left side, hold left mouse button and drag across the table. All cells of the now-selected table are highlighted, *plus a little width on its left side*.

This serves to make a distinction to the case where all the cells are selected, not the table.

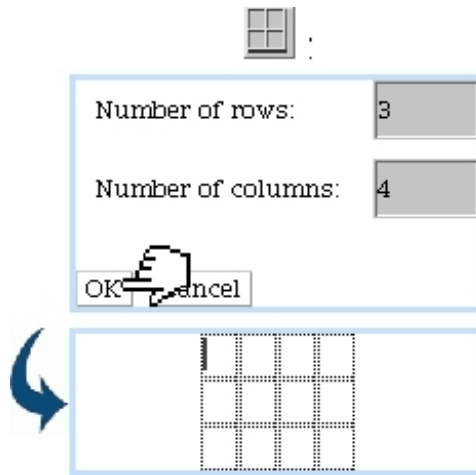


Figure 13.10: Inserting a table of 3 rows and 4 columns.

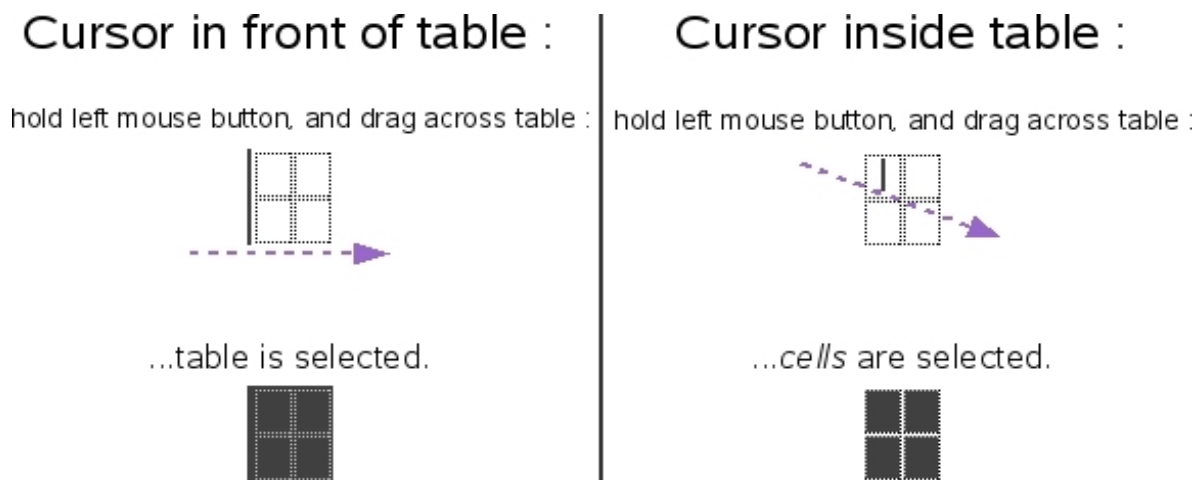


Figure 13.11: How to select an entire table to operate on it (alignment, copying,...) and how to select cells

### 13.1.4.2 Table properties

As featured on Fig.13.12, table properties can be edited as cursor is anywhere in the table via a right-click, by selecting **Table** > / **Table properties**.

There, the table alignment is chosen. Also, numerical values can be filled/chosen for the following :

- table width/height, which can be given in pixels (eg. 300) or percentage of the width/height of the page (eg. 50%) ;
- border of the table, though for practical use, a dedicated functionality exists (13.1.4.4)
- space between cells, given in pixels ;
- space around cell text, given in pixels.

If you do not want to set one or several of those values, leave them blank.

[right click in table]

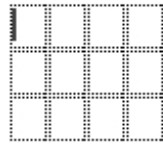


Table ▾ / Table properties :

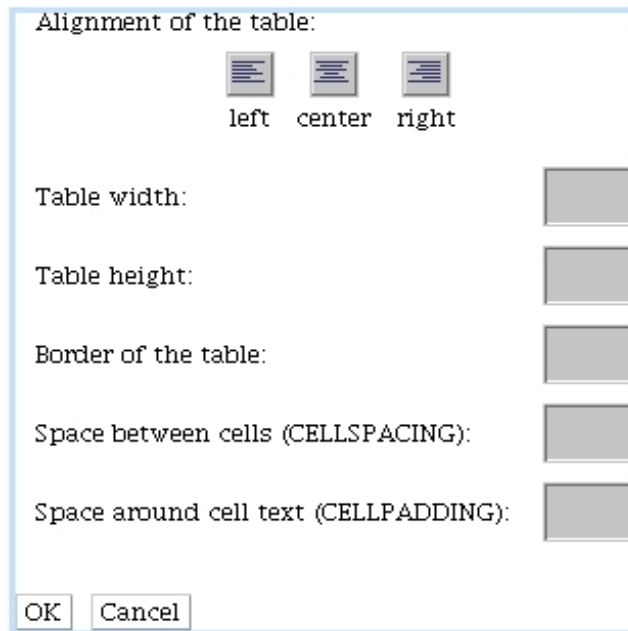


Figure 13.12: This window allows to set table properties.

### 13.1.4.3 Cell properties

As featured on Fig.13.13, via a right click and **Table ▾ / Cell properties**, it is possible to edit the properties of a single cell or a group of cells, which are highlighted by holding left mouse button and selecting them.

Horizontal and vertical alignment of text in the cell(s) can there be chosen, as well as the width/height of the cell(s) in pixels (eg. 20) or in percentage of the width/height of the table (eg. 10%). Also, the size of the cell border in pixels can be set either for the whole cell or for each of the four borders by unchecking 'Same widths' (13.1.4.3.2).

A wrap text option is also available, and so is the choice for background and border colors (which can be set for each of the four borders by unchecking 'Same border colors', 13.1.4.3.3), selected in a similar way as in Fig.13.4.

**13.1.4.3.1 Merging cells** Merging cells is done as featured on Fig.13.14, via a right click on selected cells to merge and **Table ▾ / Merge selected cells**.

To split a merged cell, put cursor in it and via a right click, follow **Table ▾ / Split selected cell**.

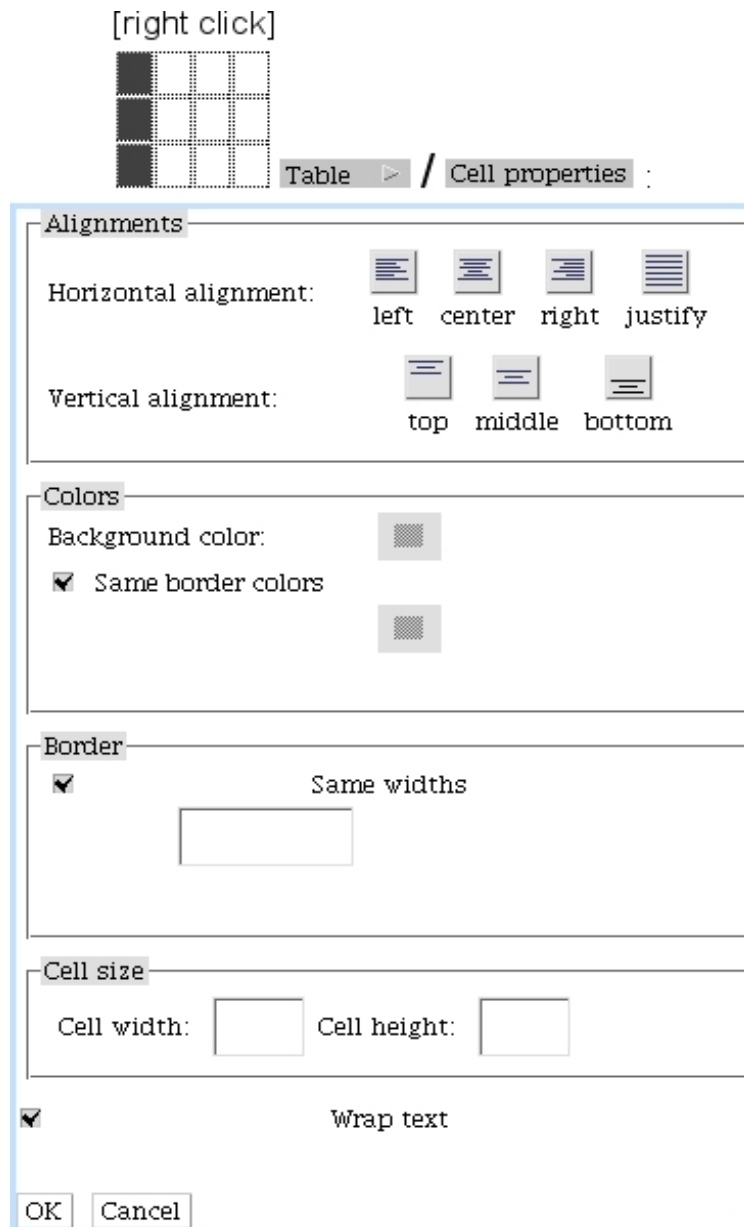


Figure 13.13: This window allows to set cell properties.

**13.1.4.3.2 Removing the borders of cells** With the possibility to edit the borders of cells (individually and in group), the Document Editor’s functionalities allows to create tables that are shaped to your very needs.

For instance, Fig.13.15 shows how to remove the outer borders in one cell of a table which had been set with even inner and outer borders (13.1.4.4).

**13.1.4.3.3 Cell coloring** Fig.13.16 shows how it is possible to set various colors for a specific cell.

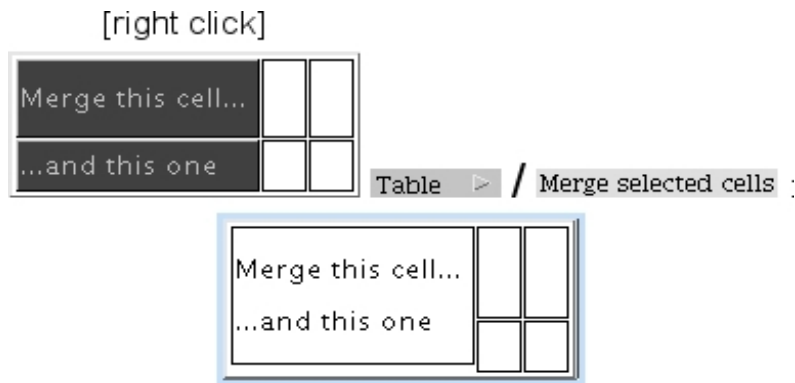
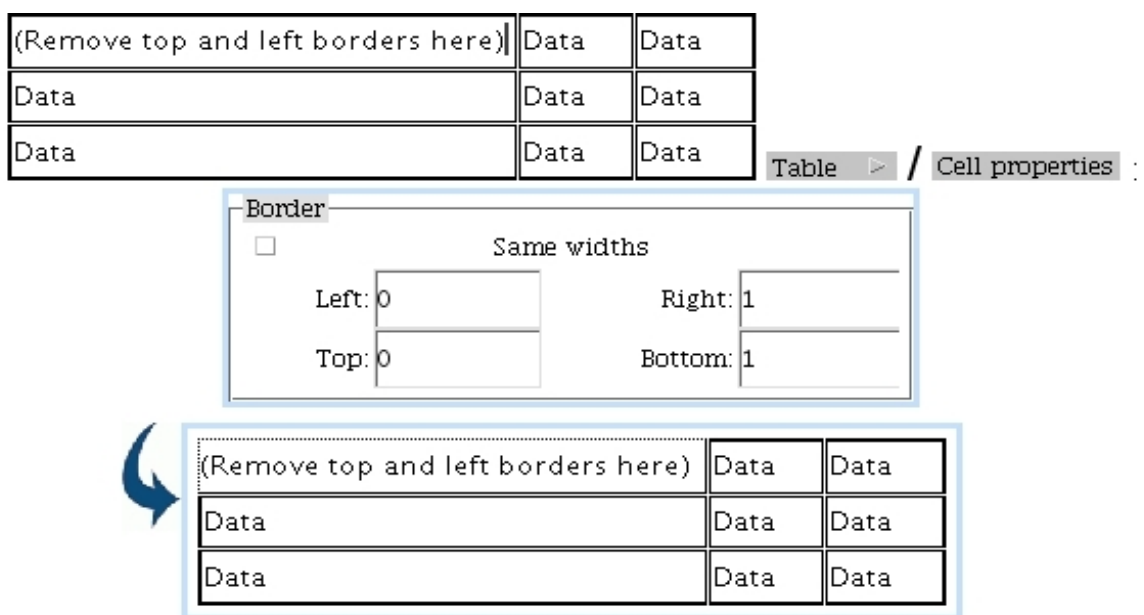


Figure 13.14: Merging a table's cells.



[Result on generated PDF] :

(Remove top and left borders here)	Data	Data
Data	Data	Data
Data	Data	Data

Figure 13.15: Removing the outer borders of one cell.

#### 13.1.4.4 Borders

Figs.13.17, 13.18 and 13.19 show how even widths for borders can be achieved, as well as making only outer or inner ones appear.

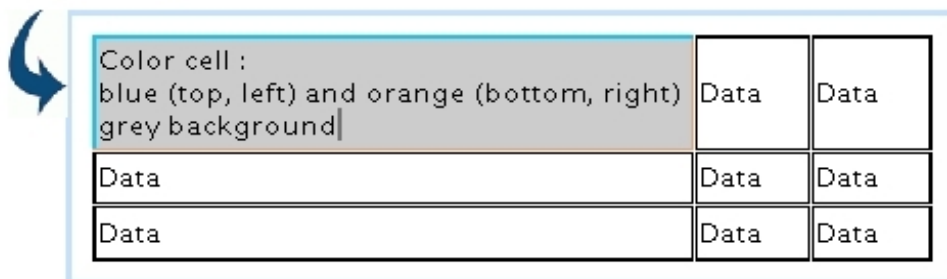
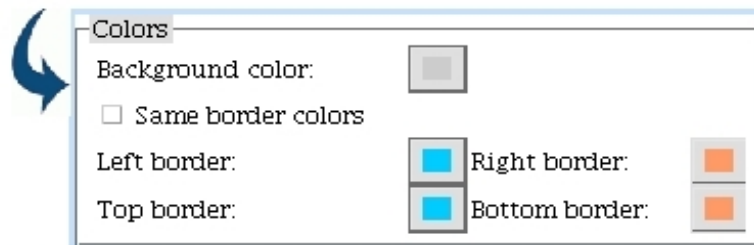


Color cell : blue (top, left) and orange (bottom, right) grey background	Data	Data
Data	Data	Data
Data	Data	Data

Table > / Cell properties :



[After background and border colors have been chosen] :



[Result on generated PDF] :

Color cell : blue (top, left) and orange (bottom, right) grey background	Data	Data
Data	Data	Data
Data	Data	Data

Figure 13.16: Putting custom colors on the borders and background of a table cell.



*These can be achieved for any number of cells inside the table.*

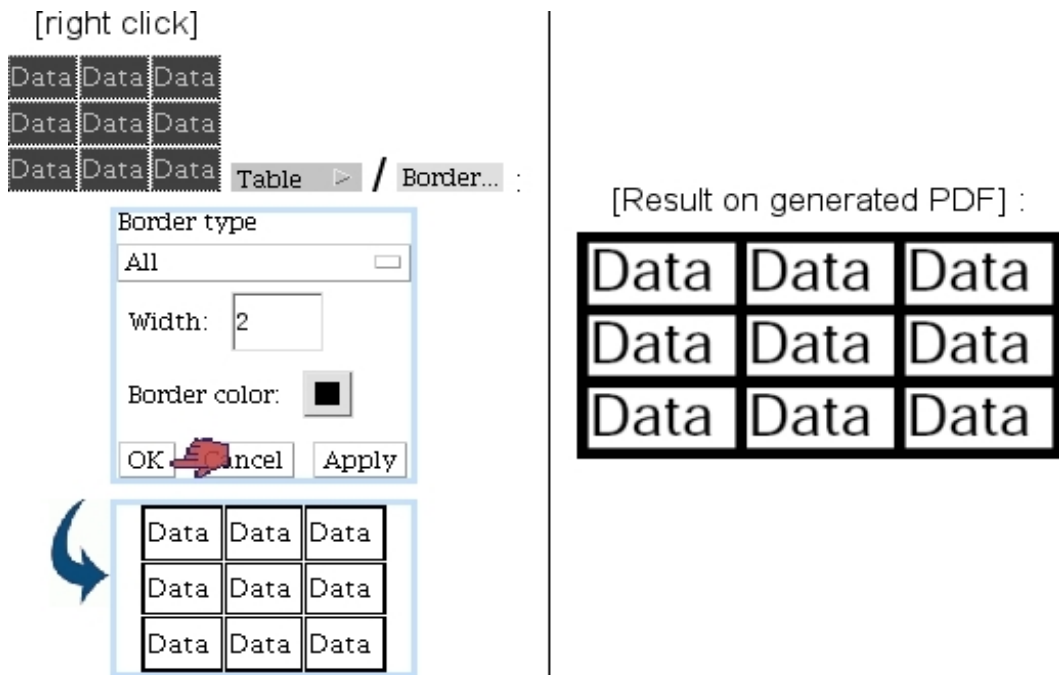


Figure 13.17: Creating a table with even inner and outer borders.

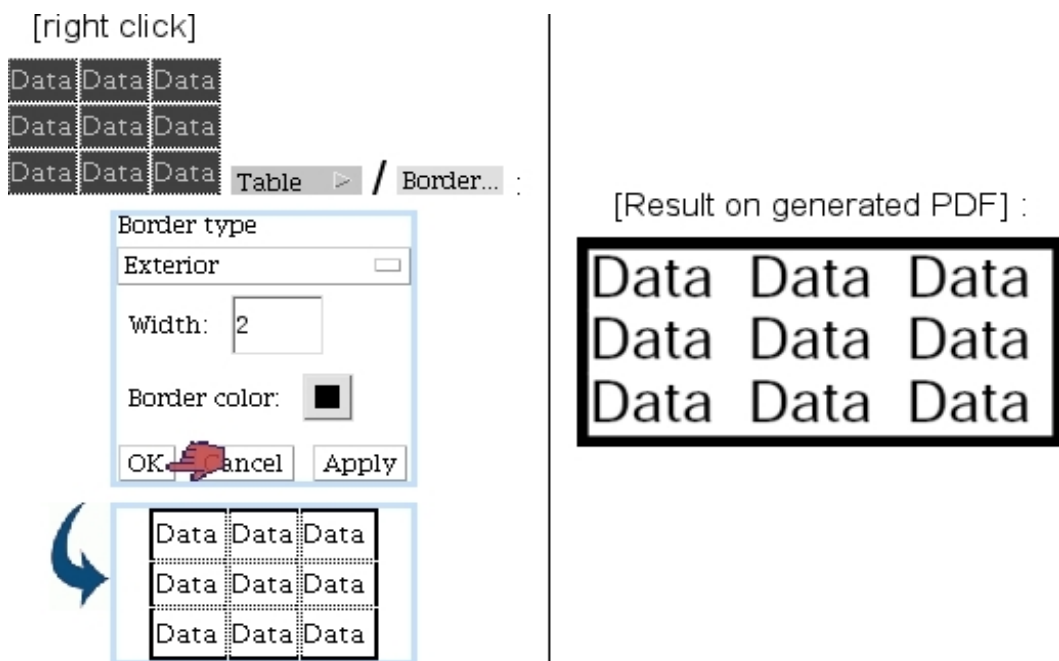


Figure 13.18: Creating a table with outer borders only.

#### 13.1.4.5 Adding columns and rows

Once created, a table can of course be expanded, column- and row- wise. For instance, Fig.13.20 features the adding of two rows : while cursor is in the table at the place where you wish to make the adding, do a right click and follow (in this case) **Table > / Add a row**.

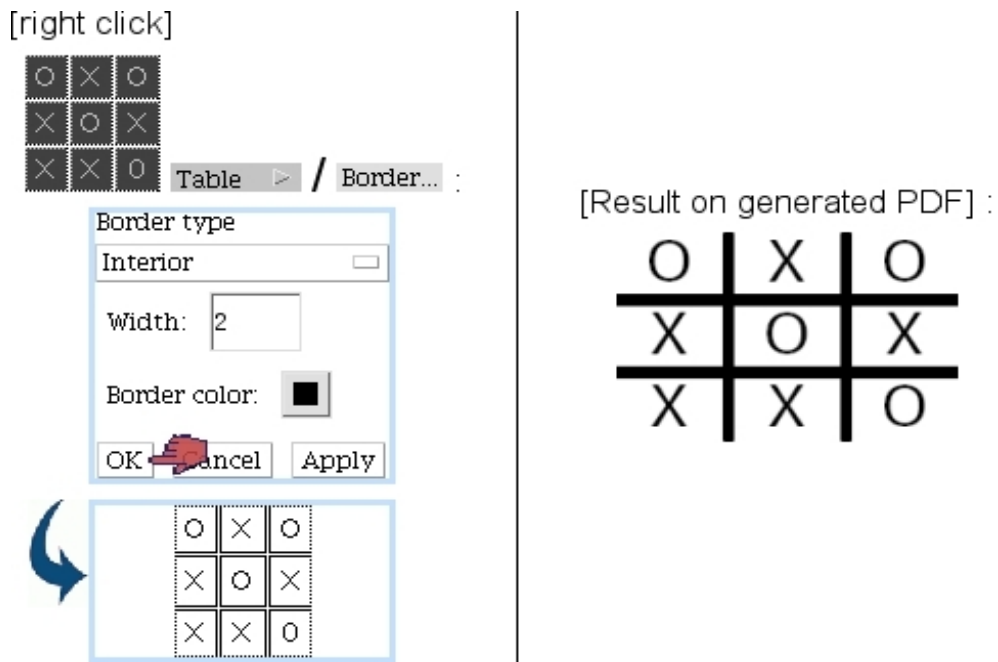


Figure 13.19: Creating a table with inner borders only.

Subsequent pop-up then asks whether the news row(s) should be added before or after the row the cursor is at.

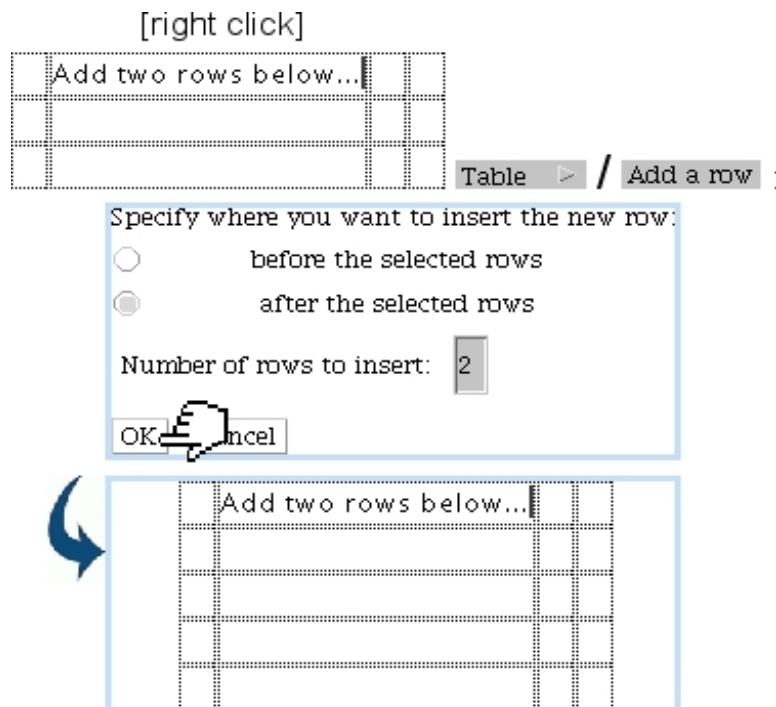


Figure 13.20: Expanding a table by two rows.

Adding one or several columns works similarly, via **Add a column**.

### 13.1.4.6 Removing columns and rows

As illustrated as an example on Fig.13.21 deleting rows works by selecting (holding mouse left button) rows to delete, right-clicking, and following `Table > / Delete selected rows`.

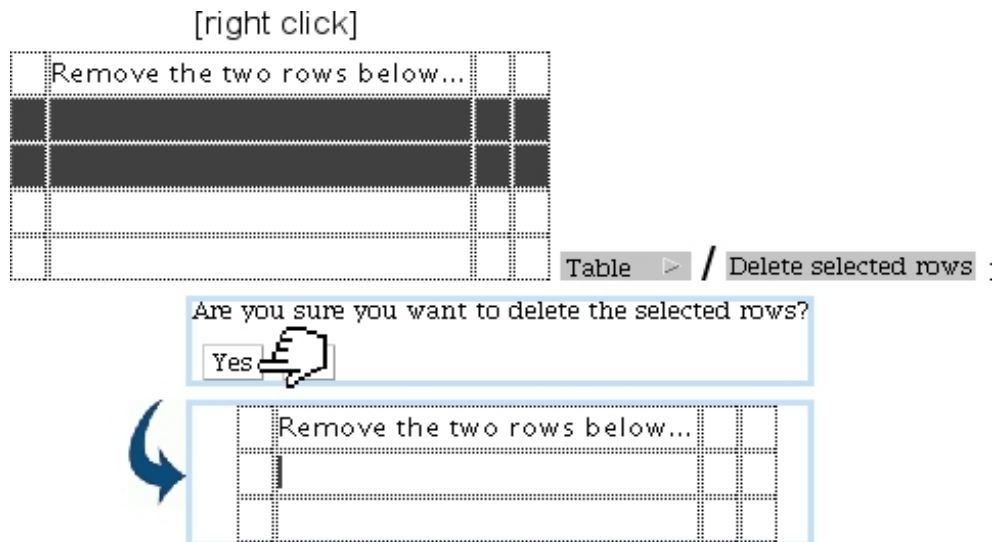


Figure 13.21: Removing these two selected rows.



Deleting one or several columns works similarly, via `Delete selected columns`.

## 13.1.5 Document images

### 13.1.5.1 Uploading images

In order to be inserted into a document, images must be first uploaded (7.4.1.1) via the File Manager in the predefined directory called 'OPSIImages' (which must never be deleted).

### 13.1.5.2 Inserting document images

As illustrated on Fig.13.22, images are inserted by placing cursor at wanted place and clicking on ; thus, on subsequent pop-up window, image is chosen amongst the ones that have been uploaded to the 'OPSIImages' folder. As a result, image appears in the Editor as a  icon: this means that image is protected (i.e. editing it in this context is disabled), and will only appear in the electronic or PDF generated document.

### 13.1.5.3 Document image properties

As featured in Fig.13.23, images as inserted in a document can be resized as needed (new dimensions given in pixels).

Also their alignment can be set and a border can be added.

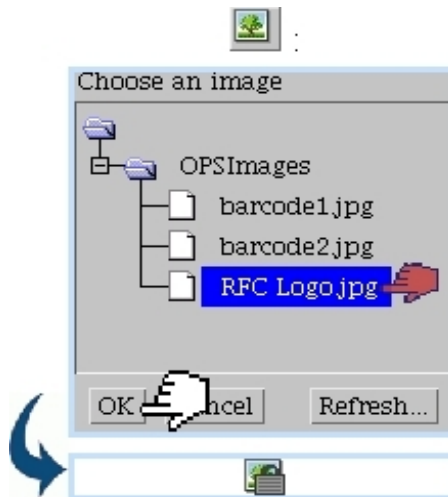


Figure 13.22: Inserting an image into a document.

[right click]

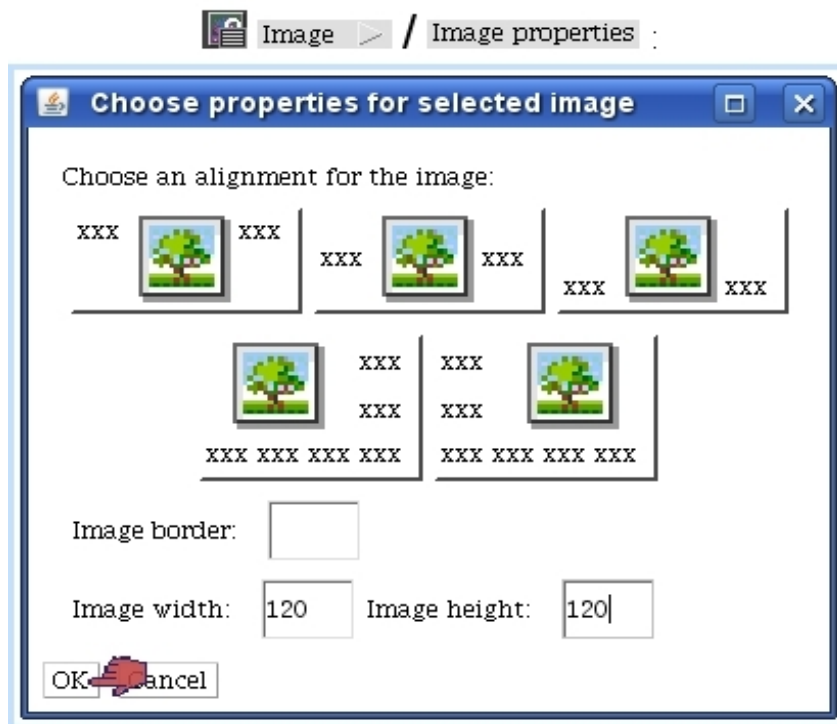


Figure 13.23: Resizing a document image.

### 13.1.6 Client-related information - and other information

The strong feature of the Document Editor is that it allows to create documents as generic as possible, client data-wise : the names, addresses,... of clients to whom the document will be sent are never typed explicitly, but instead will be integrated by Blue Chameleon during the generating phase (PDF or electronic mail) thanks to client variables accessed by `<var>`, as displayed on Fig.13.24.

For instance, putting the <FirstName> variable will make it appear as the real client's first name on the generated document.

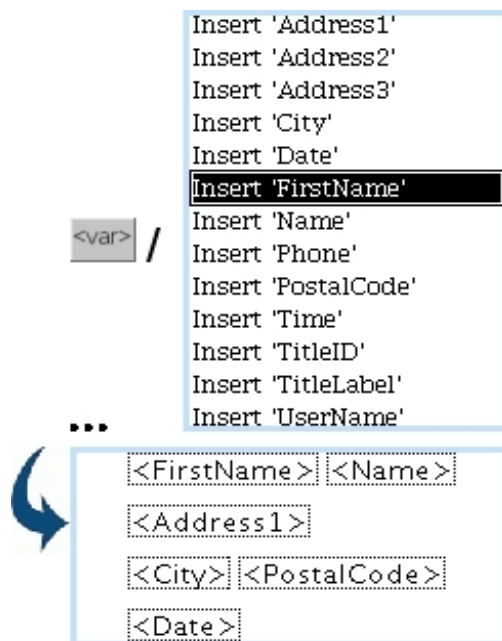


Figure 13.24: Putting clients' variables, that will be afterwards translated as client data.

Other available information is for date and time - both corresponding to the moment when the PDF/email has been generated/sent.

Here is how the example on Fig.13.24 has been interpreted :

[Result on generated PDF] :

**John Smith**  
**12 Orange Road**  
**Los Angeles 90000**  
**2008/12/12**

These variables are particularly useful when generating Customer Relationship Manager forms from predefined models (7.9.10.2).

## 13.2 Mailings and campaigns templates

Mailing and campaigns PDF documents are generated upon a print template that you can define through **General** / **Personalization** / **Print templates**. A print template

serves exactly as a prefilled "writing paper" in which you can put your company's general information (for instance its logo), etc. as well as disclaimers.

It is to note that, in the case of the 'Default' print template as used for invoice printouts (5.5.8), no header needs to be defined as it is already catered for by the invoice generating process.

### 13.2.1 Creating a template

As displayed at Fig.13.25, a print template is created by giving the following :

- the paper size (A4 or Letter) ;
- the orientation (Portrait or Landscape) ;
- the intended use : tick the 'misc.mailing' box to make it available for Customer Relationship Manager and, if you wish to use it in the context of invoices, tick also 'invoices'
- the heights to give to the header and footer margins, defined for the first page and the following pages ;
- finally, through the four Editor panels, the contents that will be placed in the headers and footers of the first and following pages.

[General](#) / [Personalization](#) / [Print templates](#) / [Add new print template](#)

### Add print template

Name:

Paper size:

Orientation:

Usage:  misc. mailing  
 invoices

All pages

Height: Header:  mm Footer:  mm

Header: **[Text Editor]**

Footer: **[Text Editor]**

First page

Height: Header:  mm Footer:  mm

Header: **[Text Editor]**

Footer: **[Text Editor]**

Figure 13.25: The page which serves to create a 'All-Purpose Print Template' to be used in two contexts, CRM and invoices.

## 13.2.2 Example

*(For the Editor general use, please see 13.1).*

### 13.2.2.1 Header

Fig.13.26 shows how, thanks to a 2-column, 1-row table, it is possible to put your company's logo and general information on the top right of the first page in a well-sorted way.

### 13.2.2.2 Footer

Fig.13.27 illustrates how to create for instance a centered disclaimer (topped by a horizontal bar) to appear at the bottom center of the first page.



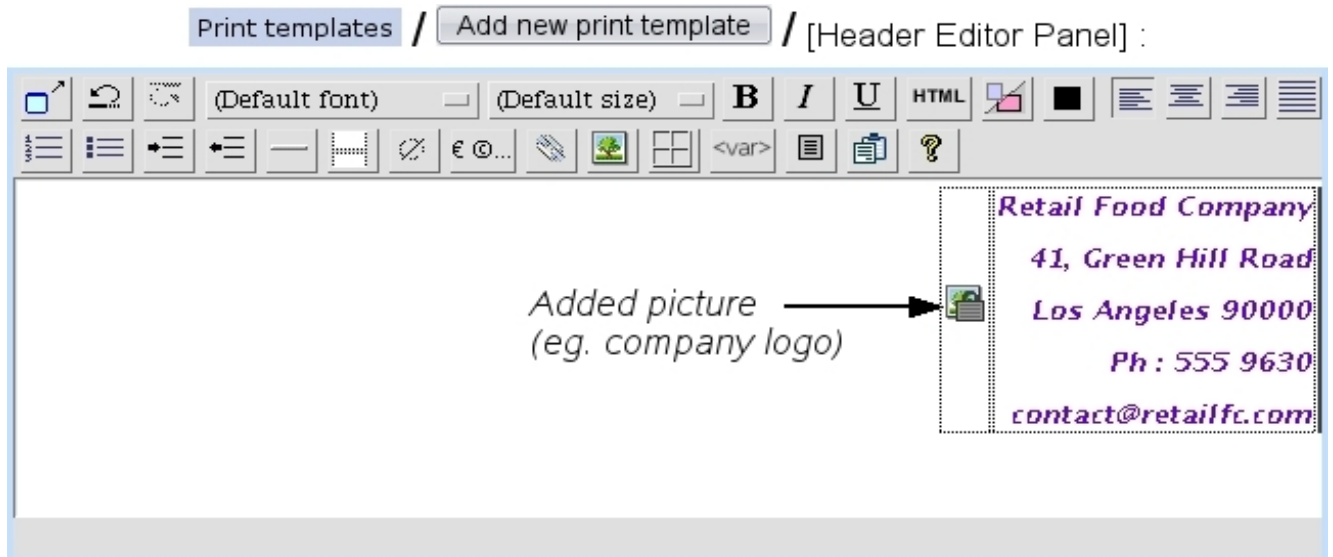


Figure 13.26: The 'Header:' Editor Panel, enabling here to design a right-aligned company logo and general information.

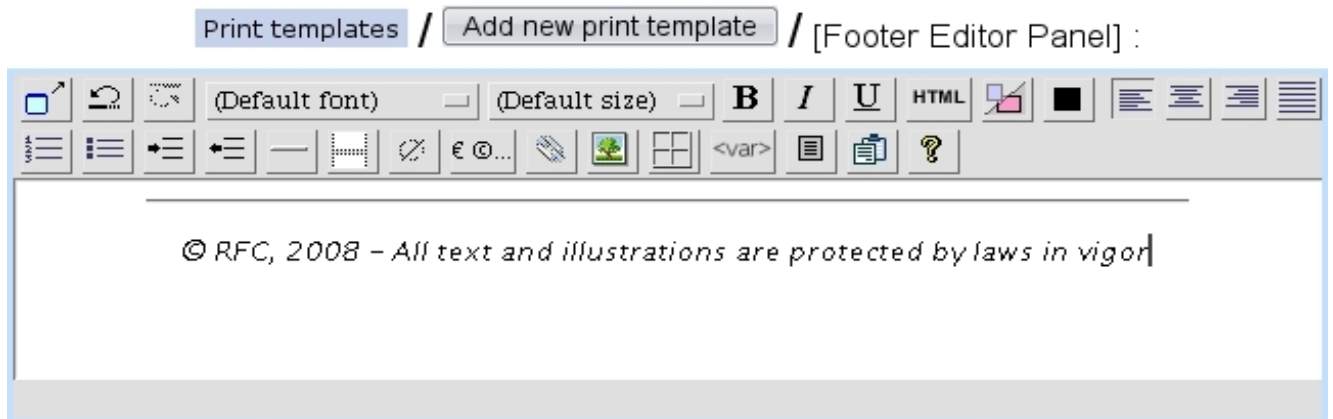


Figure 13.27: The 'Footer:' Editor Panel.

### 13.2.2.3 Result

Fig.13.28 finally shows the final writing paper obtained with the print template defined above.

[Result on generated PDF] :

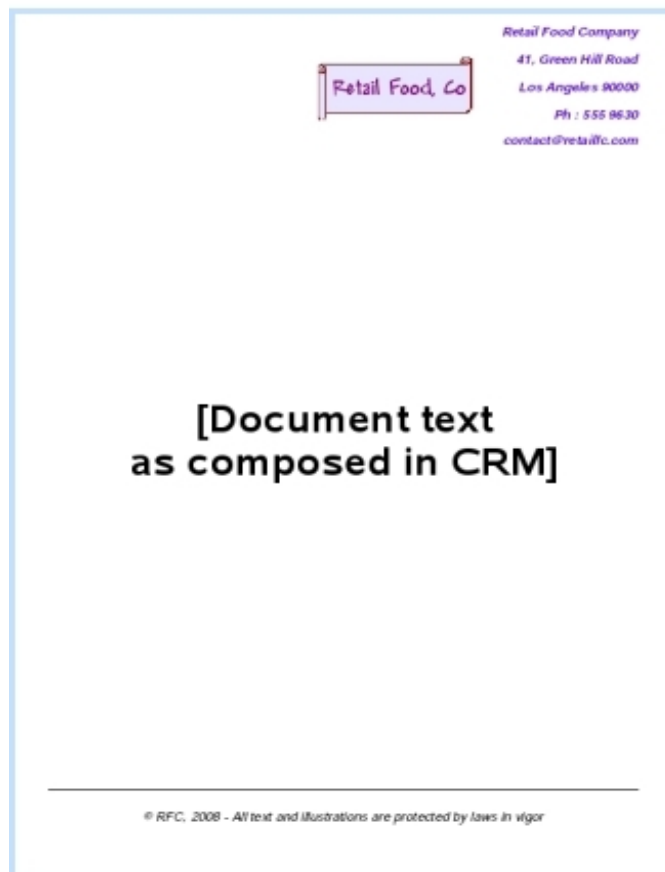


Figure 13.28: The 'All-Purpose Print Template' as it will appear on PDF-generated documents.

## 13.3 Model document management

Model documents are to be used in the context of the Customer Relationship Manager.

### 13.3.1 Creating a model document

For a new campaign (whether electronic or postal) or letter, the first stage is to create the model document, through the **New model** button as available on the *Campaign Manage Page* (Fig.7.68) or on the *Letter Manage Page* (Fig.7.77).

An Editor window then displays, where, as featured on Fig.13.29, a name for this model document is entered (here, 'New Offer') and a writing paper (see 13.2 above) is chosen. The **Create** button will then make appear a File Manager window (see 7.4) where, in this example, we save this new model document into a 'CRM' folder that has been created before (see 7.4.1.1 about folder creating).

Finally clicking **Save** on this window will create the model document in this folder, and it will now be accessed via **Select model**.

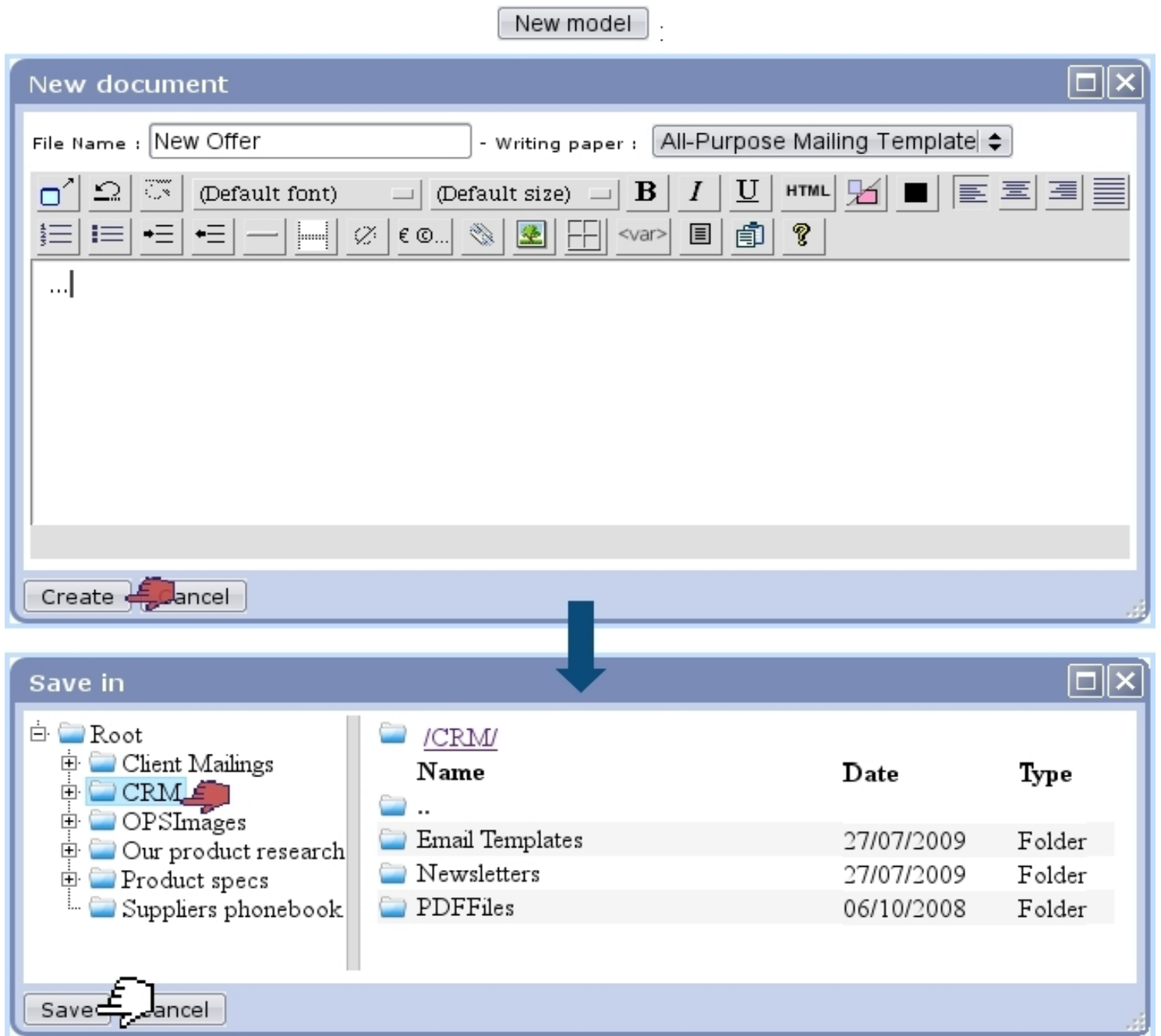


Figure 13.29: Creating a new model document.

### 13.3.2 Selecting a model document

Once created in the process as described above, a model document can be loaded via **Select model document...** as available at on the *Campaign Manage Page* (Fig.7.68) or on the *Mailing Manage Page* (Fig.7.77), as shown on Fig.13.30.

Once selected, this model document can be opened via the Editor by clicking on the now appearing [file](#).

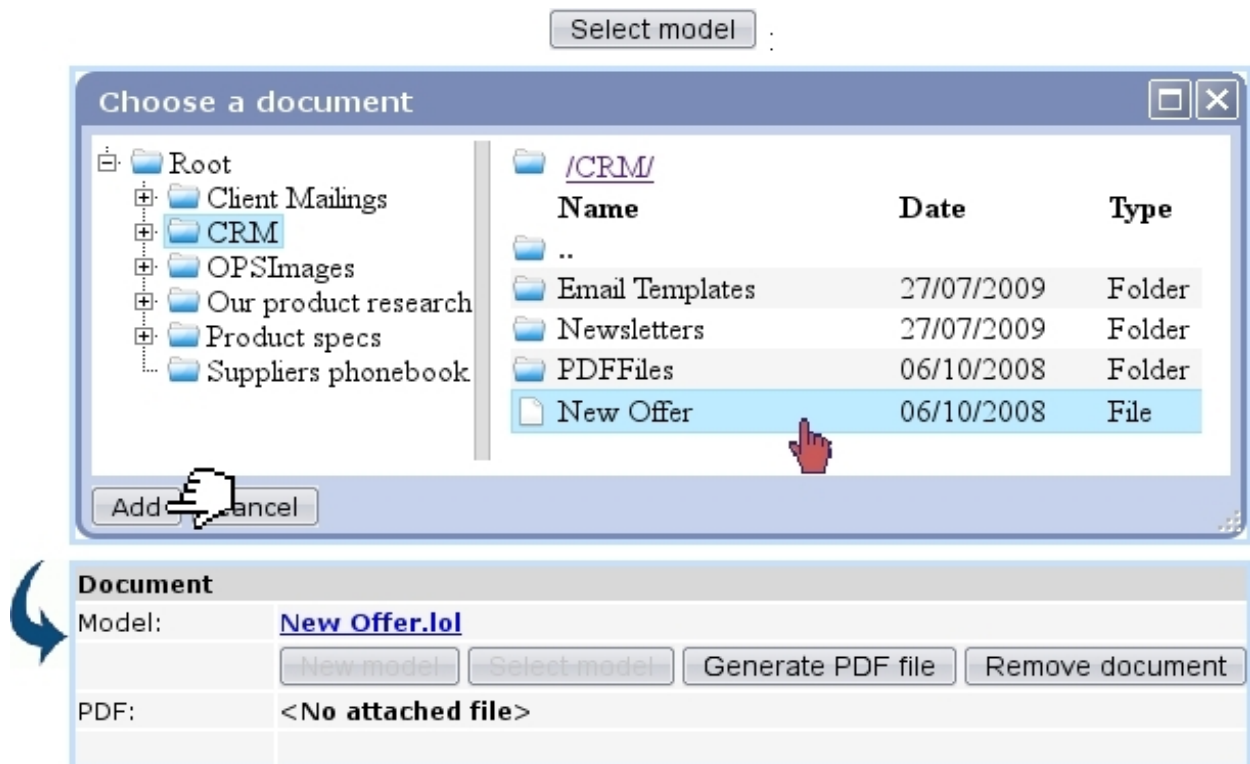


Figure 13.30: Selecting a document.

# Chapter 14

## Frequently Asked Questions

### 14.1 Questions

#### 14.1.1 On Blue Chameleon general interface

#### 14.1.2 On Client Management

1. Why adding a username and password while creating a new client ?
2. How can I update a client's address/phone number/email ?
3. How can I delete a client ?
4. Where can I register a prospect ?
5. What is the utility of "Transfer to other client" ?
6. A client I just registered does not appear through a client search : why ?
7. How can I add a specific description for a particular client ?
8. I tried to delete a client, but it is impossible, it says "Client cannot be deleted because it is referenced !" ; what to do ?

#### 14.1.3 On Article Management

##### 14.1.3.1 On article creation/modifying

1. Are article types and categories mandatory ? Can't I just create articles ?
2. What are exactly these order in front/back-office options ?
3. What could be the use of the 'Edit on order' options ?

#### **14.1.3.2 On category creation/modifying**

1. Why different levels of back-office ?
2. What do the different 'Article presentation' options give ?
3. What do the different 'Article ordering' options give ?
4. What is the best choice in 'Quantity to add to shopping cart' ?
5. What is the best choice in 'Stock support' ?
6. What are the use of the 'Client to invoice ordered articles' options ?
7. Why assessing delivery and payment methods sets ?

#### **14.1.3.3 On stock management**

1. Is stock management mandatory to use ?
2. Stock support can be defined with either article type or category ; which one overrides the other ?
3. Can I directly export my article database to create my stock article database ?
4. Is there an automatic way to input serial numbers ?
5. Is it possible to register the entry of a large quantity of items without entering serial numbers ?
6. Can I register a stock entry without a supplier document ?
7. While registering a supplier document, a supplier does not appear in the menu. Why ?

#### **14.1.3.4 On stock subscription management**

1. A client does not need to use her/his subscription during an indefinite amount of time ; what is the best to do ?
2. What if the time during which the subscription will not be used is precisely known ?
3. How to start a subscription for which no payment has still been registered ?
4. A subscription has been blocked or suspended by accident ; how can I solve this ?
5. What can subscription sets be used for ?
6. I have subscriptions for services that don't include any consumption ; does Blue Chameleon handle this ?
7. On the contrary, my subscriptions have to be invoiced according to how much the clients used it : is this also handled by Blue Chameleon ?

#### **14.1.4 On Order Management**

1. An article that I want to make an order on is not displayed at the Order page. Why ?
2. How can I prevent certain articles from being accidentally ordered ?
3. As an order is done, how can a confirmation email be sent to the client ?
4. How can I cancel an order ?
5. How can I quickly access to the whole order list that a particular client issued ?
6. Is it possible to modify an order even it has been already registered ?
7. A client orders the same article in a large quantity. How can I make this article appear once on the order form, with the corresponding quantity ?
8. Are delivery costs mandatory for each order ?
9. Is it possible to define delivery costs that depend on the order's amount ?

#### **14.1.5 On Invoice and Payments Management**

##### **14.1.5.1 On invoice basic management**

1. How can I modify an invoice to add new items ?
2. How do I cancel an invoice ?
3. How to display the invoices of a particular client ?
4. What is the use of credit notes ?
5. How can I best reconcile invoices ?
6. When does an invoice get the 'sent' status ?
7. While searching invoices, what are the use of the 'Print version' and the 'Export version' ?
8. What is the point of blocking invoices for export ?

##### **14.1.5.2 On reminding invoices**

1. How to set the date at which invoices will be reminded ?
2. When is the 'second reminder' billing status triggered ?

### **14.1.5.3 On work sets**

1. How do I practically generate invoices to be printed ?
2. How do I see then which invoices have been sent ?
3. How can I send reminding emails to clients who have not paid ?

### **14.1.5.4 On client payments**

1. How can I quickly see the balance of my client's payments ?
2. What is the use of 'internal authorization' ?

## **14.1.6 On General Accounting, including OGA**

### **14.1.6.1 On bank accounts and payment methods**

1. How can I add a bank account that is not in my country ?
2. Is it possible to define different taxes ?
3. Most of my payments are done via Paypal ; does Blue Chameleon handle this ?

### **14.1.6.2 On exporting to External System**

1. Where to are exports made ?
2. Can I use another External Accounting system than OGA ?

### **14.1.6.3 OGA**

1. What charts of accounts are handled by OGA ?
2. Why can't I achieve modifications or reconciliations on certain transactions ?

## **14.1.7 On General Tools, including OTS and CRM**

### **14.1.7.1 On News**

1. Are news displayed immediately on users' accounts ?
2. How do I restrict/authorize news broadcast for my users ?

### **14.1.7.2 On Agenda**

1. Is it possible to have coming appointments remembered as I log into Blue Chameleon ?
2. My agenda is full of appointments ; how could I make easier distinction between them ?



### **14.1.7.3 On File Manager**

1. What kind of files can I upload on the File Manager ?
2. Is there a size limit to upload a file ?
3. How can I update files on the File Manager ?
4. How can I easily move a file from one folder to another ?

### **14.1.7.4 On Customer Relationship Management**

1. How can I tell clients from prospects ?
2. How can I modify a prospect's general information ?
3. How to move a contact from one contact list to another ?
4. How should I keep documents ready for mailings and campaigns ?
5. How do I get the list of all actions issued on a contact ? Is it possible to print it out ?
6. A prospect can now be considered as a full-fledged client. How do I move her/him to the client list ?

### **14.1.8 Customer Support**

1. How can I easily get the record of complaints that a client issued ? Is it possible to print it out ?
2. I want to make the Blue Chameleon's ticket system more personalized to my activity. What can I do ?
3. How do I choose the type of ticket that I'm issuing ?
4. Is a client warned everytime an action is done on her/his complaint ?
5. Is there a way to display the time evolution of issued client complaints ?
6. Is client satisfaction is not met, is it possible to re-open a ticket ?

### **14.1.9 General Configuration**

#### **14.1.9.1 On Blue Chameleon appearance**

1. How can I add images, icons... to render Blue Chameleon more personal ?

### **14.1.9.2 On Merchant/shops/salespersons...**

1. What is the difference between the Merchant and a shop ?
2. How can I define several shops ?
3. Where are resellers useful in Blue Chameleon ?
4. What does the 'credit control class' refer to ?
5. Are defined salespersons a requirement to use Blue Chameleon ?

## **14.1.10 Advanced Functions and Configuring**

### **14.1.10.1 Ticket issuing prerogatives and administration**

1. How to prevent certain users from receiving tickets that they could not process anyway ?

### **14.1.10.2 Setting user rights**

1. The list of rights is too long. How can I rapidly set them up for my user accounts ?
2. One of my user has no access to a certain part of Blue Chameleon : why ?
3. How is the 'Delete/Create/Modify' right any different from the 'Unrestricted' one ?

### **14.1.10.3 On Main Menu personalization**


### **14.1.10.4 On the Document Editor**

## **14.2 Answers**

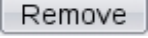
### **14.2.1 Blue Chameleon's general interface**

### **14.2.2 Client Management**

1. *Why adding a username and password while creating a new client ?*
2. *How can I update a client's address/phone number/email ?*

Updating a client's general information can be done anytime through the  button as found after a client search (2.2). There, on the *Modify Client Page* (very similar to this client's creation one), it becomes possible to edit any information you want.

3. *How can I delete a client ?*

Deleting a client is done via the  button, once again found next to a client's name after a client search.

4. *Where can I register a prospect ?*

Prospects, that is to say people that may become clients in the future, are only dealt with through the Customer Relationship Manager add-on (7.9).

5. *What is the utility of "Transfer to other client" ?*

It may happen that one client would make an order for the another (for instance if those two clients are family-related) ; the former's client data might be not necessarily needed in the future.

Therefore, transferring the former client to the latter also enables to transfer already-made orders, thus avoiding to cancel those orders on the one hand and re-creating them on the other.

6. *A client I just registered does not appear through a client search : why ?*

It is because this client is not 'active' yet, that is, s/he has made no order and has no invoice yet. On the *Client Search Page*, be sure to select in the 'Clients:' menu the option 'All', as 'Clients with order or invoice only' is always the default option.

7. *How can I add a specific description for a particular client ?*

While at the *Modify Client Page* as evoked in *How can I update a client's address/phone number/email ?*, there is a 'Comment:' text field that allows you to enter anything pertaining to this particular client.

This can be used as a reminder of specifics things to remember or know about this client, especially for new users that are not yet accustomed to the details of your client database.

8. *I tried to delete a client, but it is impossible, it says "Client cannot be deleted because it is referenced !" ; what to do ?*

As a measure of safety inside Blue Chameleon, a client cannot be deleted if there are still invoices, orders,... at her/his name : this way, no data can be lost.

## 14.2.3 Article Management

### 14.2.3.1 On article creation/modifying

1. *Are article types and categories mandatory ? Can't I just create articles ?*

Article types and categories are just here to enable structured classification ; on the other hand, it is indeed possible to create articles without the two, as Blue Chameleon has pre-defined a 'default article type' and a 'default category'.

2. *What are exactly these 'order in front/back-office' options ?*

The article you are currently creating may or may not be ordered in front office (i.e. by retail sale) and/or in back-office (i.e. by online or mail orders) ; choose then the right option.

3. *What could be the use of the 'Edit on order' options ?*

When passing an order, you may want that the article name and, most of all, its price are not to be modified : the 'Edit on order' menu then provides the 'Not editable' option so that none of them can be edited. One other choice is 'Edit article label', allowing to change if needed the name of the article as it appears on the order form.

Finally, 'Edit article price and label' permits them to be both modified ; this could be useful for instance in case a price increase or decrease has not been applied yet on the article's description.

### 14.2.3.2 On category creation/modifying

1. *Why different levels of back-office ?*

Those different levels are met on the 'Article ordering level:' menu while creating (3.1.2.2) or modifying (3.2.2.1) a category. They correlate with a similar menu on the *Modify User Page* and can be set as described in 3.3.4.2.1.

The role of this multitude of levels is to enable a real gradual classification of (articles related to) categories according their criticality and the importance of the user.

2. *What do the different 'Article presentation' options give ?*

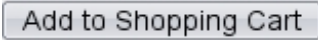
The 'Article presentation' menu deals with the way the articles belonging to this category are presented just after selecting this category while ordering :

- Picking 'single article' present these as a short list, just featuring their name and price ;

- 'all articles condensed' does the same, along now with a quantity-to-order field ;
- 'all articles detailed' features everything of the latter, plus the current article status and the corresponding article icon, if any.

### 3. *What do the different 'Article ordering' options give ?*

The 'Article ordering' menu rules the way the order is done on articles of this category :

- they are for instance ordered 'without cart', that is to say, the only choice left when adding an article (by unit or by a certain quantity, all ruled by 'Article presentation' above) will be making the order (i.e. searching for the ordering client), *not* adding another article ;
- the two other options deal with adding single or multiple articles per page to cart. The latter only applies when 'Article presentation' is set to 'all articles detailed/condensed'. Then, the choice of 'single...' will make appear an  button for the single/every (according to article presentation) article while the choice of 'multiple' will make appear this button once, which is clicked as a conclusion after inputting various quantities of that category's articles.

### 4. *What is the best choice in 'Quantity to add to shopping cart' ?*

This menu deals with the way an article appears on the order form if several copies of it are ordered :

- First, 'single occurrence with a quantity of 1' simply forbids to add another copy of this article when it has already been ordered : this can be chosen for **categories whose articles are ordered *only once by order*** ;
- then, 'single occurrence with a variable quantity' ensures that, no matter how an article belonging to that category is ordered (for instance, 3 copies are put to cart, then 6, then 1), this article will always appear once in the order form, along with the corresponding quantity (in this example, 10). This choice is advised for **categories whose articles that are prone to be ordered in large quantities** ;
- finally, 'multiple occurrences with a quantity of 1' will display this article on the order form each time it has been added to the cart. This might be the choice for **categories whose articles that, though not to be strictly ordered once, will not be ordered in large quantities neither**.

### 5. *What is the best choice in 'Stock support' ?*

It all depends on which level you want to manage stocks. If if you are not interested in stock-managing the articles belonging to this category, then pick 'no support'.

All three other options handle stocks differently :

- 'stock counter' is the choice if articles belonging to this category will not have serial numbers inputed, or if you do not want to input them ;
- 'optional stock delivery' fits if articles have serial numbers which are not known in advance ;
- 'required stock delivery' is finally the option to choose if you want to manage your stocks precisely by serial numbers, in a mandatory way Indeed, right after an order is completed, Blue Chameleon provides the  as a reminder to supply the ordered articles :



6. *What are the use of the 'Client to invoice ordered articles' options ?*

7. *Why assessing delivery and payment methods sets ?*

Delivery and payment method sets are used to gather delivery and payment methods with common features ; while creating/modifying a category, this rules the delivery and payment methods which will appear on the *Make Order Page*.

For instance, if a category holds articles that are to be picked up at shops only, it will prevent possible mistakes to assess this category a delivery method set that contains every pick-up-at-shop delivery method.

### 14.2.3.3 On stock management

1. *Is stock management mandatory to use ?*

Of course not. If you wish to use only Blue Chameleon article management features without stock management, it is advised that you select 'disabled' for the 'Stock management' menu in the Merchant Configuration (9.1.4).

2. *Stock support can be defined with either article type or category ; which one overrides the other ?*

It is always what has been chosen for category that ultimately decides for the stock support of an article.

3. *Can I directly export my article database to create my stock article database ?*

[In Development]

4. *Is there an automatic way to input serial numbers ?*

[In Development]

5. *Is it possible to register the entry of a large quantity of items without entering serial numbers ?*

[In Development]

6. *Can I register a stock entry without a supplier document ?*

Of course, as  is clicked on, the 'Document:' menu provides the option 'without document' as default. Then, clicking on  will lead you to the supplying process without the hassle of defining a supplier document.

7. *While registering a supplier document, a particular supplier does not appear in the menu. Why ?*

For a supplier to appear in this menu, at least one stock article must have been defined with this supplier, as chosen under 'Supplier and purchase price' on the *Add Stock Article Page*.

#### 14.2.3.4 On stock subscription management

1. *A client does not need to use her/his subscription during an indefinite amount of time ; what is the best to do ?*

In this case, the best thing to do is suspending the subscription through  as available on the corresponding *View Subscription Page* (3.7.1.5). The start date can be arranged as needed. The day client decides that s/he needs access to her/his subscription again, it will be reactivated through , starting that very day.

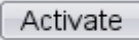

2. *What if the time during which the subscription will not be used is precisely known ?*

Like before, the subscription is suspended in the same way. But now, the reactivation can be scheduled for the date on which it will be needed again, and this delayed reactivation can be done just after the suspend, so that it will not be forgotten.

3. *How to start a subscription for which no payment has still been registered ?*

The possibility to start or not an yet unpaid subscription is ruled by the 'Order subscription in advance first' tick box as available while at the subscription creation page : tick it if you are sure that there is no risk to start subscription whereas payment may have not been received, or if payment method is naturally prone to delays.

4. *A subscription has been blocked or suspended by accident ; how can I solve this ?*

In these two cases only, it is possible to re-activate this subscription through . In the case of a accidental subscription block, client is charged despite not having access to the service : so it is fair to postpone the subscription end date through the  button (always at this *View Subscription Page*), adding the same number of extra days that client has been deprived of.

5. *What can subscription sets be used for ?*

Subscription sets are useful to gather subscriptions according to certain criteria. Blue Chameleon's subscription system indeed provides a subscription search tool (3.51) that allows to perform searches cumulating various criteria such as, for instance, the issued date (through the related order number, 4.1.6) and the status.

The list of subscriptions returned by this search can then be put into a set (3.7.3.3).

For example, one could create a 'Suspended subscriptions, current year' that could be filled by using this status and the current year as the search criteria.

6. *I have subscriptions for services that don't include any consumption ; does Blue Chameleon handle this ?*

These 'basic', consumption-less subscriptions are simply defined as such during their creation, by picking 'Subscription' in the 'Usage type:' menu.

7. *On the contrary, my subscriptions have to be invoiced according to how much the clients used it : is this also handled by Blue Chameleon ?*

Indeed, this time the choice for 'Usage type:' can either be 'Subscription with variable consumption' or 'Variable consumption only', depending on whether the subscription to create has a fixed cost or not.

## 14.2.4 Order Management

1. *An article that I want to make an order on is not displayed at the Order page. Why ?*



Go to the *Modify Article Page* for this specific article and select for 'Order article:' either 'order in back-office only' or 'order in front- and back- office' (see *What are exactly these 'order in front/back-office' options ?*).

2. *How can I prevent certain articles from being accidentally ordered ?*

In the same menu as talked about in the question above, pick this time 'Not orderable'.

3. *As an order is done, how can a confirmation email be sent to the client ?*

A 'Send confirmation email to client' tick box is available at the last page before final order confirmation ; email will be sent to the email address as defined in this client's general information.

4. *How can I cancel an order ?*

The canceling of an order is achieved thanks to the eponymous button, as available on the *Order Details Page* (4.3).

5. *How can I quickly access to the whole order list that a particular client issued ?*

As many searches dealing with a particular client's data, her/his order list is better accessed through her/his *Client Management Page*, with the  button. This leads to a standard *Search Order Page* with all the criteria (status, salesperson, category,...) but displaying only the orders this particular client did.

6. *Is it possible to modify an order even it has been already registered ?*

Indeed, and it is done through the  button that appears right to each order after an order search. Modifying an order allows to edit everything except order status itself.

7. *A client orders the same article in a large quantity. How can I make this article appear once on the order form, with the corresponding quantity ?*

If an article is to be ordered in large quantities, its category's 'Quantity to add to shopping cart' must preferentially set to 'single occurrence with a variable quantity' (see *What is the best choice in 'Quantity to add to shopping cart' ?*)

8. *Are delivery costs mandatory for each order ?*

Of course not, as it is possible to define delivery methods that have no cost.

9. *Is it possible to define delivery costs that depend on the order's amount ?*

Indeed, and a specific example for this is given at 4.13.

## 14.2.5 Invoice and Payments Management

### 14.2.5.1 On invoice basic management

#### 1. How can I modify an invoice to add new items ?

Should a client want other items to be added after an order has been registered, it is indeed possible to add some more, thanks to the **Modify** button as available for *each* invoice after an invoice search ; the *Modify Invoice Page* it leads to provides a 'Article list' menu with every possible article no matter which type or category it belongs to :

#### Modify invoice

...

Article	Quantity	Unit price	Total price	Total tax	Tax rate	
Chunky Choc Bar	3	2.00	6.00	0.34	6.00 %	Delete #1
Standard mail	1	8.00	8.00	0.45	6.00 %	Delete #2
<b>Total</b>			14.00	0.79		

---

Article list **Cola 6-Pack**

Article	Quantity	Unit	Total price	Total tax	Total (tax incl.)	
Cola 6-Pack	5	3.00	15.00	0.85	15.00	Add

#### 2. How do I cancel an invoice ?

Only invoices for which no payment has been yet registered can be canceled, which is achieved through the **Cancel** button once again found after an invoice search right to (unpaid) invoices.

#### 3. How to display the invoices of a particular client ?

Similarly as for displaying a particular client's orders, this is best achieved through the *Client Management Page*, this time with the **Invoices** button. The same search criteria as for a normal invoice search are available, but now targeted on this client's invoices only.

#### 4. What is the use of credit notes ?

Credit notes are registered whenever *you* owe money to a client, for instance when a payment has been registered but the order has been canceled afterwards (for instance, because of a lack of items in stock).

#### 5. How can I best reconcile invoices ?

There are three main ways of using a given client's payment to reconcile her/his invoices :

- sorting the invoices with amounts decreasing, and **reconciling in priority the invoice with the biggest amount** (if there is enough money to do so), then, if enough money remains, reconciling the next invoice, and so on : this way, you are sure that the most expensive items are paid for, once for all ;
- sorting the invoices with amounts increasing, and **reconciling this way the highest possible number of invoices** : this will reduce the quantity of invoices and therefore the paperwork that may arise with possible reminders ;
- **reconciling the invoices chronologically** : this prevents the client from getting reminders (and even worse) and you from producing consequently too much paperwork.

6. *When does an invoice get the 'sent' status ?*

The 'sent' status is automatically assessed to an invoice that belonged to a successfully sent invoice print set (5.5.6).

7. *While searching invoices, what are the use of the 'Print version' and the 'Export version' ?*

While 'Normal version' (the default choice for the version menu) displays a clickable list of invoices along with buttons, the 'Print version' only features useful information and appearance (i.e. no links and no buttons) so that this list can be printed out (see Fig.14.1)

Invoice list by date					
28/7/2008	#2008072801005	paid	Bauer Kim	Bauer.Kim	29.00
28/7/2008	#2008072801003	paid	Barnes Cletus	Barnes.Cletus	12.00
...					
1/7/2008	#2008070101001	paid	Bauer Kim	Bauer.Kim	108.00
<b>Total (22):</b>					<b>1813.00</b>

Figure 14.1: An invoice search, led under 'Print version'.

The 'Export version' yields the same list, but also a flat file which contains the same information.

8. *What is the point of blocking invoices for export ?*

The 'Export:' menu, which is accessible on whatever *Modify Invoice Page*, provides two options : 'not exported' and 'blocked for export'. The former will enable this invoice to be exported to the external accounting system, while the latter will forbid it.

### 14.2.5.2 On reminding invoices

1. *How to set the date at which invoices will be reminded ?*

Invoices are reminded only when you take the action of reminding them, through the **Remind open invoices** button.

2. *When is the 'second reminder' billing status triggered ?*

The 'second reminder' billing status is triggered when a reminding has been done on invoices that were already reminded once. Blue Chameleon finds automatically the invoices to be second-reminded via **Remind open invoices**, and there picking the 'Second reminder' option in the 'Reminder type:' menu.

Similarly, third reminders are generated from second-reminded invoices by picking 'Third reminder' in that menu.

### 14.2.5.3 On work sets

1. *How do I practically generate invoices to be printed out and sent ?*

One of Blue Chameleon's greatest feature is the automatic generation of invoices to be sent by email and printed out, through *work sets*. Simply follow the method described in 5.5.2 : first create an 'Invoice' work set, with the template that you'd like to see as a result ; this includes for instance filling in a personalized mail header, footer, prologue.

Then, **Add invoices to set** and finally **Send set** : a PDF file has been generated featuring all the invoices you added, one after the other, in a formal presentation including the ordered article, the client's general information and the template you defined.

2. *How do I see then which invoices have been sent ?*

Invoices that have been sent (through the process described above) can be easily displayed with an invoice search, by selecting 'sent' in the 'Status:' menu :

Blue Chameleon ensures that invoices that have been sent do not appear when adding invoices to a work set for sending.

3. *How can I send reminding emails to clients who have not paid ?*

The whole process of sending reminding emails is described lengthfully at 5.5.5. It is also worth noting that the same method exactly applies for second and third reminders. If these are ever needed, you may want to define their dedicated work

**View invoices**

Date: Any - Any

Client name pattern:

Status: <Any>

Display: <Any>, <Not paid>, open, sent, reminded, canceled, paid

sets : indeed, the general tone of a second (moreover third) reminder as it appears in the mail template is to be more exigent than a first reminder's is.

#### 14.2.5.4 On client payments

1. *How can I quickly see the balance of my clients' payments ?*

Through **Client payments** / **Client balances**, you can access to the global result of the sums of credits, debits and therefore balance. The dates until which invoices and payments are taken into calculation are set by default to the current day.

2. *What is the use of 'internal authorization' ?*

Some orders might be placed for non-tangible goods such as subscriptions. Despite a payment for such a good has not been registered, you might still want to declare the ordering client as granted access to the ordered facility : that is what 'internal authorization' means.

### 14.2.6 General Accounting

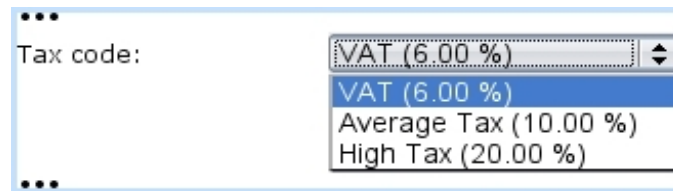
#### 14.2.6.1 On bank accounts and payment methods

1. *How can I add a bank account that is not in my country ?*

[In Development]

2. *Is it possible to define different taxes ?*

Through use of the **Add new tax** button found through **General** / **Miscellaneous** / **Taxes**, you can add as many taxes as you wish. Whenever a tax code has to be defined (when creating a new article, for instance), a drop-down menu lets you pick which tax you want :



3. *Most of my payments are done via Paypal ; does Blue Chameleon handle this ?*

Of course, Paypal is one the payment methods that is pre-defined in Blue Chameleon.

#### 14.2.6.2 On exporting to External System

1. *Whereto are exports made ?*

If OGA is equipped on your Blue Chameleon account, exports are done to OGA either manually (6.1.2) or automatically (6.1.3) provided that, while on the page as accessed via **Export to external system** the 'Export into local accounting system:' box is ticked.

2. *Can I use another External Accounting system than OGA ?*

Of course, the use of Blue Chameleon's Online General Accounting tool is not mandatory ; for that matter, while exporting to external system, a .XML file can be generated as described in 6.1.2.

#### 14.2.6.3 On OGA

1. *What charts of accounts are handled by OGA ?*
2. *Why can't I achieve modifications or reconciliations on certain transactions ?*

For transactions to be modified or reconciled, the journal (6.5.4) they belong to (as chosen when transaction was recorded, 6.5.6.2) must have 'Allow modifications/reconciliations on journal's postings' checkboxes ticked.

Those can be modified anytime via **Option** / **Journal** / *Journal* **Modify** .

This issue only rises if journal is of the 'General' or 'Shop to general accounting' types, for which modifications/reconciliations can be allowed or not, contrary to the other journals ('Opening balance', 'Opening/closing balance').

## 14.2.7 General Tools

### 14.2.7.1 On News

1. *Are other users immediately warned of any news that I publish ?*

Published news will instantly appear on a user screen whenever s/he user logs in or clicks on **Home** ; provided that s/he has enabled the 'News' event control (1.7), which is strongly advised. Otherwise, s/he will see this recent news piece as soon as s/he goes onto **Add-ons** / **News**.

2. *How do I restrict/authorize news broadcast for my users ?*

For whatever reasons, some news emanating from certain users may not be of interest to some other users groups. So, for a specific user, here is an example of how her/his news rights are set, from the News Administration Page (7.1.1) :

Access Rights :		
Accounting	None	Ok
Administrator	Create/Delete/Modify	Ok
Customer Support Group	Create/Delete/Modify	Ok
External Relations	None	Ok
Sales Department	None	Ok

This way, this user only issues news to the Administrator and Customer Support user groups, as shown below :

Send to :	
<input checked="" type="checkbox"/>	Administrator(admin)
<input checked="" type="checkbox"/>	Customer Support Group(James; Karen)

### 14.2.7.2 On Agenda

1. *Is it possible to have coming appointments remembered as I log into Blue Chameleon ?*

Indeed, and for this, you must have the Agenda event control enabled (1.7). Also, it is possible to set alarms for them (7.3.4).

2. *My agenda is full of appointments ; how could I make easier distinction between them ?*

The RV types page (7.2.2.1) can be of help. There, as shown below, you can define a color (7.2.2.2) for each RV type ; it is then advised to carefully choose/modify

them so that, as a result, appointments can easily be told apart on the Agenda page, as seen as a result on Fig.14.2.



Figure 14.2: Setting two different colors for two appointment types.

What is more, a *particular* appointment can be emphasized by changing its color on its *Modify Page* (7.2.3.2), provided that related type had 'Modifiable:' (below color) checked.

#### 14.2.7.3 On File Manager

1. *What kind of files can I upload on the File Manager ?*

Basically any kind of file can be uploaded to the File Manager as no discrimination is made upon the file extension.

2. *Is there a size limit to upload a file ?*

Large files can be uploaded, with the constraint of uploading time.

3. *How can I update files on the File Manager ?*

In order to update files, it is enough to upload the file again, in the same folder : a pop-up then asks you if you want to replace the file, which you will accept.

4. *How can I easily move a file from one folder to another ?*

The simplest of displacing a file is downloading it, then erasing it on its File Manager former location and finally upload it in its new location.

#### 14.2.7.4 On Customer Relationship Management

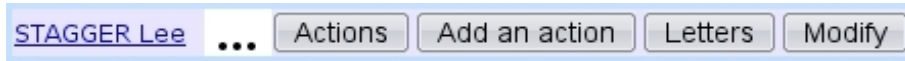
1. *How can I tell clients from prospects ?*

Prospects only appear in the context of CRM ; it is then easy to distinguish them from other clients as they appear (after a contact search) in a violet background instead of a grey one.



2. How can I modify a prospect's general information ?

After a contact  through which your contact appears, you will find your prospect along with four buttons :



The  button then enables to display a pop-up window with the editable general information that had been inputed while at this prospect's creation.

It is to note that this button only appears for prospects : standard clients' general information is edited on the other hand in the Clients interface.

3. How to move a contact from one contact list to another ?

This can be achieved most easily by first removing this contact from her/his primary list and then adding her/him on the new list. As a reminder, both lists are accessed lengthfully via the [Modify](#) link as found after a contact list search.

4. How should I keep documents ready for mailings and campaigns ?

Documents for mailings and campaigns can only be created in the Customer Relationship Manager context, through . But, once created, a document can be used for any campaign or mailing : thus, it is possible to write "basic" documents containing only the client's information, the date,... (13.1.6) along with a writing paper and a constant header and footer (13.2).

Then saved, such a basic document can be opened through  and expanded according to the specifics of a particular campaign or mailing.

5. How do I get the list of all actions issued on a contact ? Is it possible to print it out ?

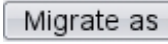
The  button as found after a contact search (see *How can I modify a prospect's general information ?*), whether client or prospect, allows to displays the actions taken on her/him :

Date	User	Client	Action	Status	Type	
21/10/2008 10:00	Malone Richard	<a href="#">STAGGER Lee</a> (5559510)	On 21 Nov 2008 at 10AM, we [...]	To do	Call	<a href="#">Modify</a>
8/10/2008 15:18	Malone Richard	<a href="#">STAGGER Lee</a> (5559510)	New Offer for L.A. Residents !!	Other	Mail	<a href="#">Modify</a>
8/10/2008 11:00	Malone Richard	<a href="#">STAGGER Lee</a> (5559510)	Appt. w/ Mr.Stagger has been [...]	User	Appointment	<a href="#">Modify</a>

**Nb of Actions : 3**

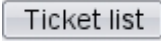

As it can be seen, it is possible to  this list (in development). Also, if needed, a particular action can be edited by clicking on [Modify](#).

6. *A prospect can now be considered as a full-fledged client. How do I move her/him to the client list ?*

In order to "promote" a prospect as a client, display the pop-up window on which her/his general information can be edited, as described in *How can I modify a prospect's general information ?* above : at the bottom of this window, a  button is available to achieve this promoting.

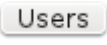
## 14.2.8 Customer Support

1. *How can I easily get the record of complaints that a client issued ? Is it possible to print it out ?*

The *Client Management Page* for the client whose tickets you wish to see conveniently provides a , which displays in a pop-up window the list of tickets that have been issued for this client. There, it becomes also possible to print this list thanks to a dedicated  button.

2. *I want to make the Blue Chameleon's ticket system more personalized to my activities. What can I do ?*

According to the different types of complaints your customer support service receives, you may want to define more than one ticket type (the default-defined one being 'customer'). To do so, follow the guideline to create a new ticket type (10.4). Then, be sure that user groups that might issue tickets of this new type (for instance, a 'Suppliers' ticket type should be accessed by members of a user group dealing with external relations) by adding it to the list of ticket types that they can issue (10.5).

Finally, at the user level go to  to set to 'any' the 'Ticket Types :' menu for this user's corresponding user group (10.4.3).

If on the other hand you do not want to create a new ticket type, add categories parameters to the default ticket type as described in 10.2.2.1. In that example, the default ticket type is given a new property (or category) called 'Complaint' which has two values (or parameters), 'Product-related' and 'Service-related'.

3. *How do I choose the type of ticket that I'm issuing ?*

A user may issue the ticket type that is defined as default for her/his user group (10.5).

4. *Is a client warned everytime an action is done on her/his complaint ?*

It is possible to warn a client everytime an action is accomplished on her/his ticket, by ticking the 'Notification email/SMS' boxes. But, if you wish to do an action without warning client of it, simply leave these boxes unticked.

5. *Is there a way to display the time evolution of issued client complaints ?*

In order to check how a complaint is solved, Blue Chameleon records any action or assignment taken on the ticket by day, time, user. The record of these can be then displayed anytime by [viewing](#) this ticket.

6. *Is client satisfaction is not met, is it possible to re-open a ticket ?*

Of course, and this can be done anytime after ticket closure. Be sure to display that to-be-reopened ticket through a ticket search including closed tickets (pick either 'closed' or 'any' for the 'Status:' menu). Next, [viewing](#) it will dutifully provide a  button.

## 14.2.9 General Configuration

### 14.2.9.1 On Blue Chameleon general appearance

1. *How can I add images, icons... to render Blue Chameleon more personal ?*

Different images can be added in the way described at 9.7 ; it is possible to add images for the following elements of your Merchant :

- article types and categories ;
- articles ;
- shops.

### 14.2.9.2 On Merchant/shops/salespersons...

1. *What is the difference between the Merchant and a shop ?*

The Merchant may be considered as the main entity through which your business activity is done. Then, it can be refined through defining several shops if you happen to have several sale outlets : for instance, it renders delivery matters more accurate, in particular for the 'Pick up order at shop' delivery method. At least one created shop is by the way mandatory if you use that delivery method.

2. *Can I define several shops ?*

Of course. Once a shop has been created through  / , other ones can be readily defined without limitations.

3. *Where are resellers useful in Blue Chameleon ?*

4. What does the 'credit control class' refer to ?

A credit control class consists in defining a credit baseline...

5. Are defined salespersons a requirement to use Blue Chameleon ?

Of course not, it remains absolutely possible to make orders without any salesperson defined. Salespeople enable to keep a track of who did which order.

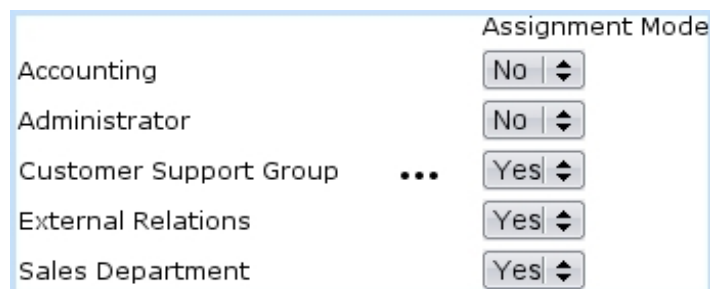
## 14.2.10 Advanced Functions and Configuring

### 14.2.10.1 Ticket issuing prerogatives and administration

1. How to prevent certain users from receiving tickets that they could not process anyway ?

This requirement is in fact ensured right at the beginning : instead of blocking the *receiving* of a ticket by an unrelated user, Blue Chameleon rather primarily prevents it to be *assigned* to that wrong user.

Assignments rights are set from ticket user administration page (as accessible via [Helpdesk](#) / [Administration](#) / [Users](#)), for instance :



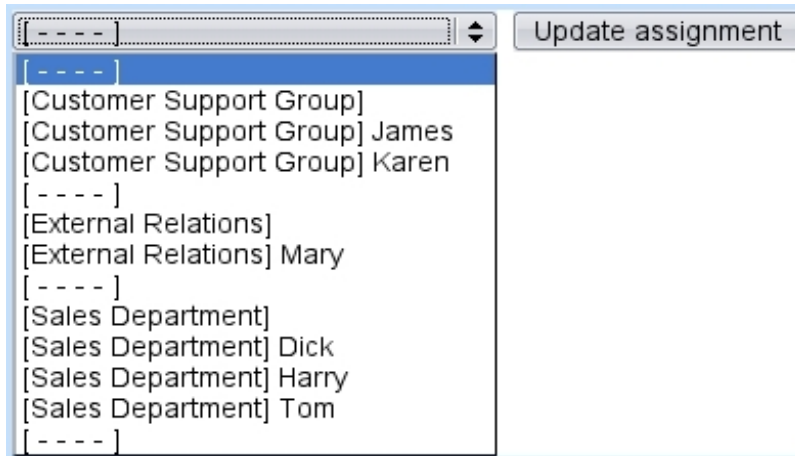
	Assignment Mode
Accounting	No
Administrator	No
Customer Support Group	Yes
External Relations	Yes
Sales Department	Yes

There, that user will not be able to send any ticket to Admin and to any user member of the Accounting user group : as shows the picture below, Admin and the Accounting user group will not even appear in the Assignment menu :

It can be noticed that user Mary, who is also a member of the Accounting group, still appears in this menu : but she appears as a member of the External user group, to which assignment was authorized. That is because the Blue Chameleon ticket assignment system is not based upon a user's skills, but upon her/his skills *as a member of a particular user group*.

### 14.2.10.2 Setting user rights

1. The list of rights is too long. How can I rapidly set them up for my user accounts ?



While you get more accustomed to Blue Chameleon functioning, it bears no serious consequence to assess automatically admin's rights to a user by selecting 'admin' at the top of the *Modify User Page/Add User Page* :



This is the quickest way to achieve it. Also, you can assess 'Delete/Create/Rights' for a specific user's every right and then use this user to be copied rights from.

2. *One of my users has no access to a certain part of Blue Chameleon : why ?*

This is because your user has 'None' as the right for that specific part : be sure to check the relevant line, assess 'Delete/Create/Modify' and try again.

3. *How is the 'Delete/Create/Modify' right any different from the 'Unrestricted' one ?*

At first glance, the former seems to bear no difference with the latter ; but it must be kept in mind that 'Unrestricted' specifically concerns the Administrator, allowing her/him to perform very specific things that any other user with 'Delete/Create/Modify' could not do.

### 14.2.10.3 Main Menu personalization

### 14.2.10.4 The Document Editor



# Chapter 15

## An Electronic Newsletter

In essence, a newsletter is a periodic, informative email that is massively sent to a list of contacts. While a simple document in itself, it nonetheless enables powerful and straightforward ways to achieve fruitful communication between a company and its clients or prospects. The frequency with which it is sent helps to strengthen faithfulness so that your name is never to be forgotten.

In order to assist you in this important task, we aimed to design a system that is at the same time intuitive to use and efficient in its realizations.

### 15.1 Introducing the case

Basically, the creation and sending of a newsletter would call for three major steps :

- first, having a list of contacts ready (or creating it from scratch) ;
- then, writing and building the document "newsletter" itself, including maybe graphics and links to websites ;
- finally dispatch the finalized newsletter to the list of contacts.

The great feature of Blue Chameleon's Customer Relationship Management is that these three deeds no longer have to be done in that strict order ; indeed, CRM's simple handling of contact lists, documents and sending make that any can be managed separately, anytime.

May you have a project for a newsletter, or just an idea thereof, it is simple to create an *electronic campaign* (7.9.8.1). Giving it an explicit name, for instance "Quadrennial Meeting", describes its intended use at first glance when using CRM. This campaign is yet an empty shell to which a contact list and/or a document is to be attached :

[After electronic campaign "Quadrennial Meeting" has just been created] :

Title	Type	Status	Creation	Contacts	Document	
<a href="#">Quadriennial Meeting</a>	Electronic campaign	Opened	20/07/2011	<input type="text"/>	<input type="text"/>	...

Clicking on the name of the campaign leads to the *Campaign Manage Page* as featured in Fig.15.1 where the following actions are possible :

- the title of title can be modified, if needed : in this case, as we for instance want this newsletter to be sent for August, we re-titled the campaign "**Quadrennial Meeting (Aug11)**" ;
- the contact list can be associated ;
- the email header can be set up (15.2.2) ;
- the document that will be sent can be associated.

These can be done in no particular order.

**Quadrennial Meeting** (after renaming to 'Quadrennial Meeting (Aug11)') :

Campaign : View/Modify	
<b>Campaign : Quadriennial Meeting (Aug11)</b>	
User :	<b>Jones Jack</b>
Type :	<b>Electronic campaign</b>
Title :	<b>Quadriennial Meeting (Aug11)</b> <input type="button" value="Modify"/>
Status :	<b>Opened</b>
<b>Contact list</b>	
	<No contact>
	<input type="button" value="Choose"/>
<b>Email header</b>	
From :	<Your email address>
CC :	
BCC :	
Subject :	
	<input type="button" value="Modify"/>
<b>Email</b>	
	<input type="button" value="New model"/> <input type="button" value="Select model"/>

Figure 15.1: This important page enables to accomplish any campaign-related deed.

## 15.2 Building the newsletter

It has to be emphasized the following actions can be achieved anytime, in the succession you want.



## 15.2.1 Handling contact lists



### *Advantages :*

- There is no limit to the number of contacts as gathered within a contact list : it can be just one person as well as hundreds of them ;
- there is no limit neither on the number of contact lists than can be created.

Contact lists in Blue Chameleon can be composed in different ways. Either the contact is already registered as a client (2.1), in which case s/he is simply added to the list, or s/he is created in CRM context, manually (7.9.3.1) or via the import of a CSV file (15.2.1.1).



### *Tips :*

- when building a contact list from clients (as illustrated below), look for them according to the aim of list : if it has a local aim, it is more practical to make a search according to geographical data by filling in the 'City:' or 'Zipcode' fields accordingly ;
- in case of large number of contacts to import, and/or if their data is incomplete, it is better to set up (if not already obtained by means of a spreadsheet) a CSV file of those and upload it (15.2.1.1).

In this example of an English language newsletter, clients are filtered by their preferred language, as set on their *Modify Client Page* (2.2.3) :

[Members](#) ...  /  :

**Add existing contacts to contact list**

**Contacts**

Search contacts by :

Name/Company :  Zip code/City :

Address :  Tel :

Email :  Type / Language :

...

Once set up, this "Members" contact list to which the newsletter can be associated with the campaign from the *Campaign Manage Page*, which in this case displays this :

...

Contact list
<a href="#">Members</a> - 147 contact(s) (47 prospect(s), 100 client(s))

...

And, on the list of campaigns, the number of contacts attached to this campaign are now displayed :

Title	Contacts
<a href="#">Quadriennial Meeting (Aug11)</a>	147

### 15.2.1.1 Importing contacts

Our newsletter might still not be complete without the adding of a few prospects that showed interest. It might often happen that the information pertaining to these people is incomplete and heterogenous, though ; but it is not an issue for CRM :



**Appending an incomplete CSV file** In the case of an electronic newsletter, only the email matters, that is why, even a list consisting only of emails could be uploaded. For that matter, as an example, here is an excerpt of a list of contacts showing lack of information for certain data, but still with a valid email for each line :

```

first name; last name;   city; email
;         Mason;        ; mason@mail.com
Cleo;     Burns;      L.A.; cleo.burns@web.com
;         ;              ; id0521kpx23@ctu.gov
Josh;    ;             ; josh@ua.com
...      ...          ...    ...

```

Blue Chameleon nonetheless allows this incomplete file to be successfully uploaded through  (7.9.3.5.1).

### 15.2.2 Filling in the email header

The filling of this part, described in details at Fig.7.73, gives you the freedom to choose any mail address that you want the recipients to see as the sender of the newsletter. If needed, CC and BCC fields may be used, for instance for you to receive also a copy of the newsletter.

Once the email header has been filled in, the *Campaign Manage Page* for instance displays this :

Email header	
From :	<b>info@company.com</b>
CC :	
BCC :	
Subject :	<b>Quadriennial Meeting August 11</b>
<input type="button" value="Modify"/>	

### 15.2.3 Composing the newsletter

From the *Campaign Manage Page*, you might want to create a  from scratch or  if you already prepared a template according to the tip given at 15.5.2. The latter way is the most efficient through time as newsletters are composed of recurring elements.

Any way, Fig.15.4 gives a rough example on how a newsletter could be built ; but do not be afraid to enrich yours with further elements.

Once the newsletter has been composed, reviewed and deemed fine, it is added to the campaign and the *Campaign Manage Page* in this case displays this :

...	
<b>Email</b>	
Model :	<a href="#">Newsletter Aug11.crm</a>
	<input type="button" value="New model"/> <input type="button" value="Select model"/> <input type="button" value="Visualize"/> <input type="button" value="Remove document"/>
PDF :	<No PDF>
Attached file :	<None> <input type="button" value="Add"/>

And, on the list of campaigns, the document attached to this campaign are now displayed :

Title	...	Associated PDF
<a href="#">Quadriennial Meeting (Aug11)</a>		<a href="#">Newsletter Aug11</a>

### 15.3 Sending it !

Only when the campaign "Quadrennial Meeting (Aug11)" has been equipped with a contact list, an email header and a document as described above, a  button appears : clicking it is necessary so that the campaign may be send, in order for you to check one last time if it is fine to send.

Then, once sure, proceed to the sending as described in 7.9.8.2.

### 15.4 Managing it through time

The whole example above dealt with a newsletter called "Quadrennial Meeting August 11", attached to a campaign called "Quadrennial Meeting (Aug11)". The next newsletter, for instance to be dispatched in December, will very probably not differ a lot from the August one. That is why the clever managing offered by Blue Chameleon's Customer Relationship Management enables to save time, thanks to the duplication.

Indeed, sent campaigns can still be accessed, giving :

Campaigns / Status : Sent ... Search /

Title	Status
<a href="#">Quadriennial Meeting (Aug11)</a>	Sent

**Campaign : View/Modify**

**Campaign : Quadriennial Meeting (Aug11)**

User : **Jones Jack**

Type : **Electronic campaign**

Title : **Quadriennial Meeting (Aug11)**

Status : **Sent - 29/7/2011**

**Contact list**

[Members](#) - 147 contact(s) (47 prospect(s), 100 client(s))

**Email header**

From : **info@company.com**

CC :

BCC :

Subject : **Quadriennial Meeting August 11**

**Email**

Model : **Newsletter Aug11.crm**

PDF : [Newsletter Aug11.pdf](#) - 29/7/2011 10:15

Attached file : **<None>**

Campaign is then 'd and its title is modified :

Title :

The contact list attached to this "new" campaign is the one of August (which can be modified if needed). The subject as entered in the email header is modified to "Quadrennial Meeting December 11" and, if the changes to make to the newsletter are small, the document [Newsletter Aug11](#) is simply opened to be updated (and saved under a new name, logically "Newsletter Dec11").


It is finally be ready to be sent.

Eventually, the campaign list will display the history of those sent campaigns :

Title	Type	Status	Creation
<a href="#">Quadriennial Meeting (Dec11)</a>	Electronic campaign	Sent	24/11/2011 ...
<a href="#">Quadriennial Meeting (Aug11)</a>	Electronic campaign	Sent	20/07/2011

## 15.5 Tips

### 15.5.1 Images for electronic campaigns

Images (13.1.5) to be used in documents are on the File Manager unto the predefined /OPSIImages directory and then included into the document via ; this consequently generates a document physically containing that/those image/s.

This can also be done for electronic campaigns and mails : the featured images will be embedded in the received emails.

Another way of doing (Fig.15.2) is by uploading the images on the Internet (on your company's website). Here is how to include an image, knowing the URL at which it can be reached.

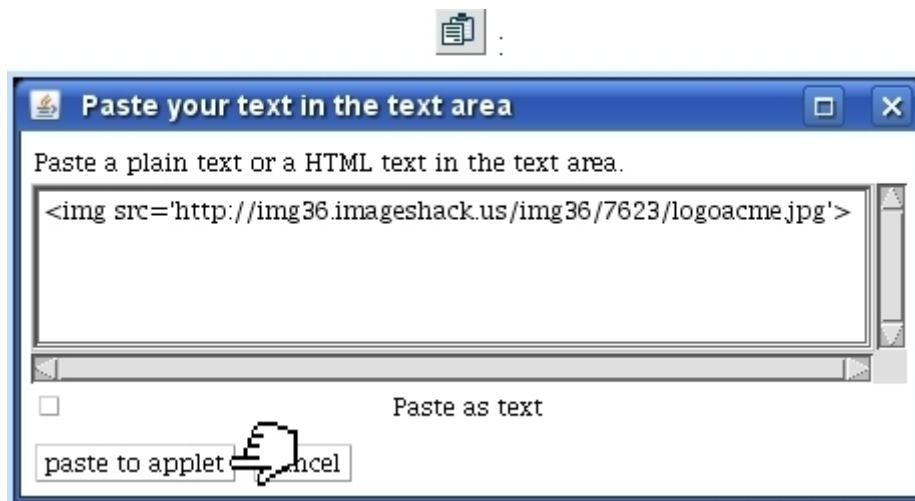



Figure 15.2: Including a picture as a link to the web link where it has been uploaded.

Two advantages stem from this way of doing :

- generated emails then basically contain only text, therefore are quicker to send ;
- contrary to a physical include via , picture shows immediately when composing the document, which thus gives a better preview.

### 15.5.2 Using templates

To quicken creation of your documents, it is useful to have one or several templates ready. The following shows a guideline about how to do this in an efficient way.

#### 15.5.2.1 Creating a "Email Templates" folder and creating templates

Through the File Manager (7.4.1.1), first create a "Email Templates" folder under folder /CRM (Fig.15.3).

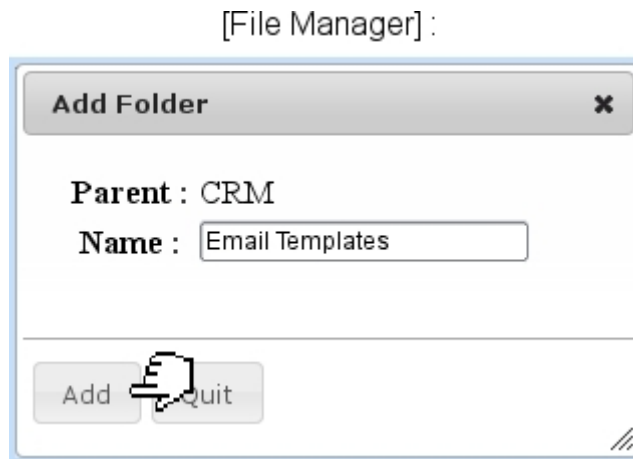


Figure 15.3: Creating a dedicated folder to keep in templates of documents.

Then, as displayed for instance on Fig.15.4, a template is created, including the following :

- a system of tables to which include data in the future ;
- constant things such as a company logo, an introduction and an instruction to sign off the newsletter.

In that example, the logo image has been added more conveniently as an HTML link, as described at 15.5.1.

### 15.5.2.2 Opening templates

When a newsletter is needed to be sent, a template can now be opened through **Select model** instead of being created from scratch through **New model**. As shown on Fig.15.5, one must be careful to save it under a new name, for instance in a created /CRM/Newsletters folder.

New model :

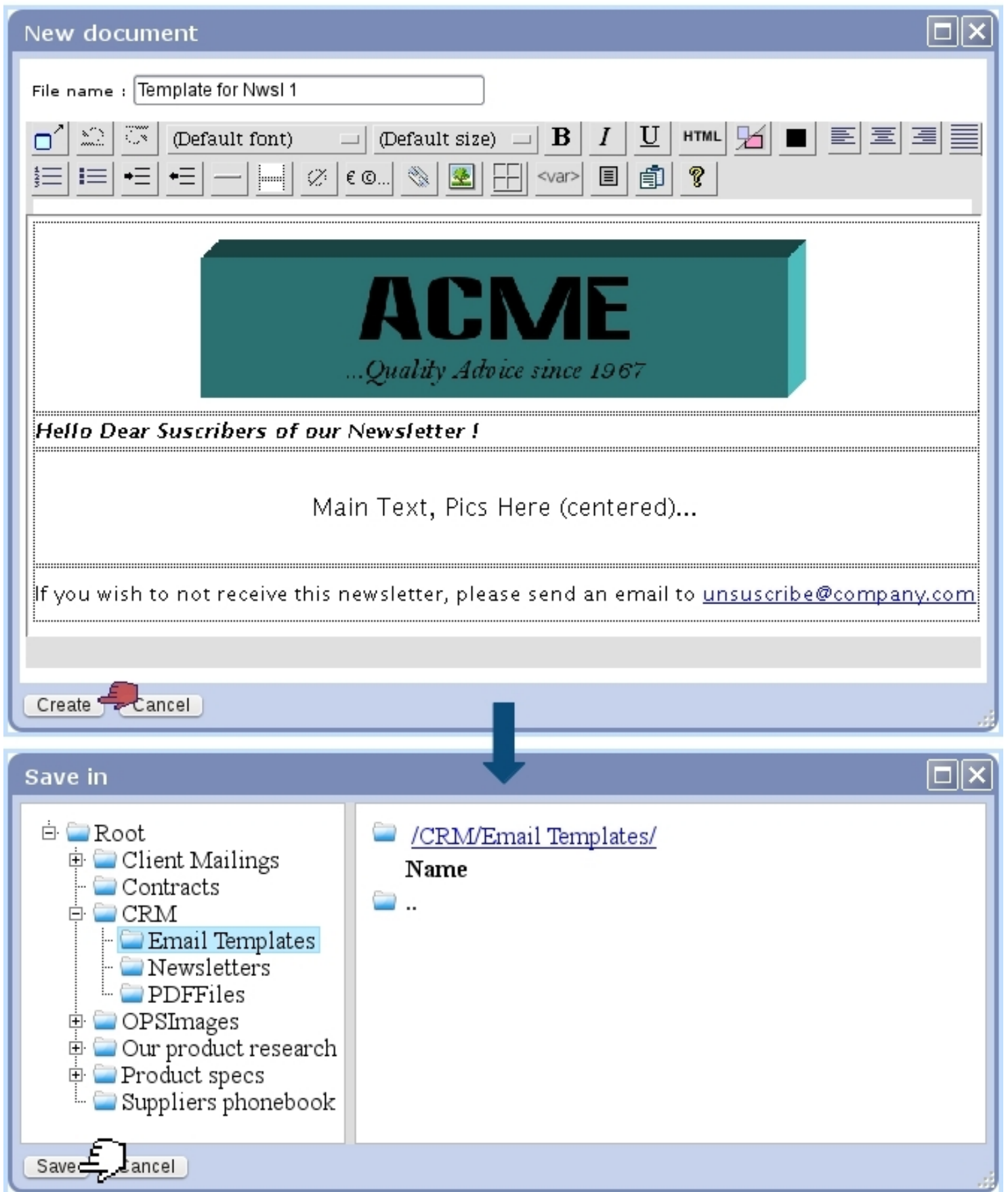


Figure 15.4: An example of a template for newsletters, that is to be saved under the folder /CRM/Email Templates.



Select model :

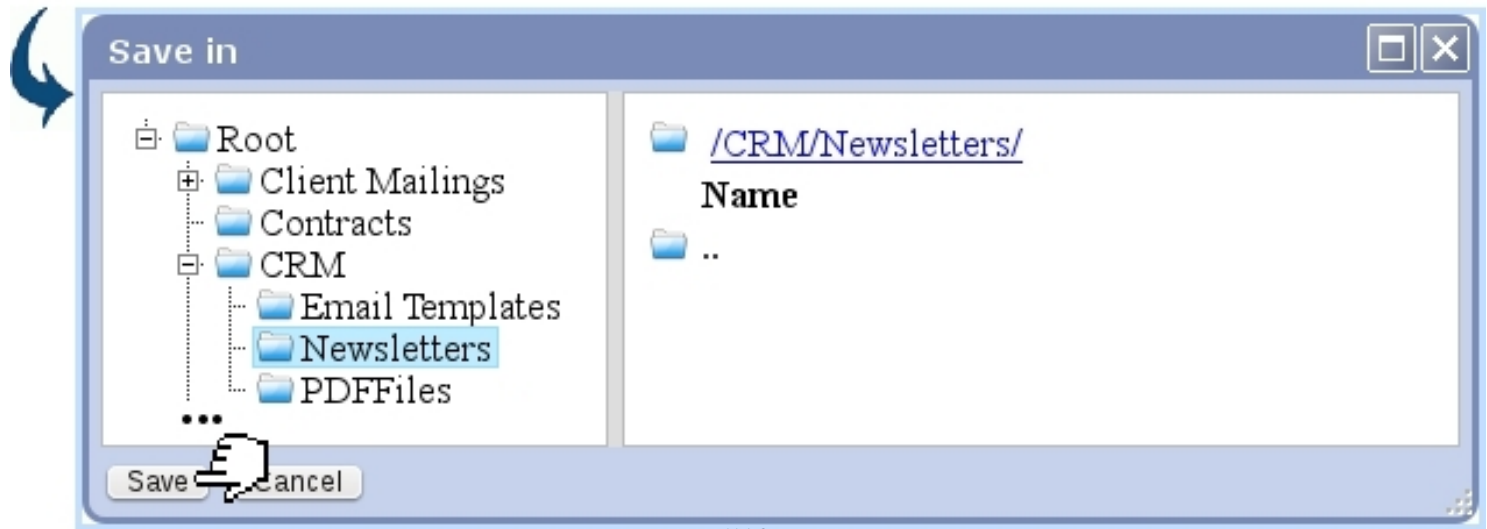
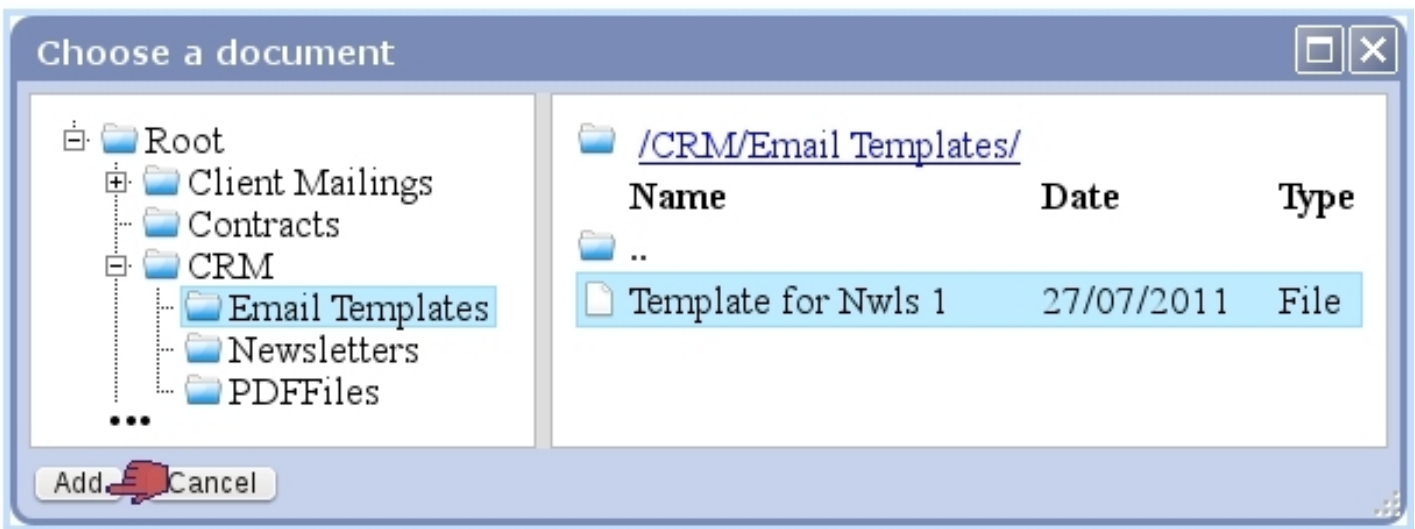


Figure 15.5: Opening a previously-made template for an electronic newsletter and saving it under a new name, in a dedicated folder.