



BLUE CHAMELEON (Basic Documentation)

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download the relevant chapter or the **Blue Chameleon Full Documentation**.*



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Chapter 0

Blue Chameleon Setup Guide

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 - ii. set Suppliers as enabled, if you wish to include them (9.6) ;
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 - 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).

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- (b) Articles creation (3.1.1).

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- (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.

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If you use Customer Relationship Manager add-on :

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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.

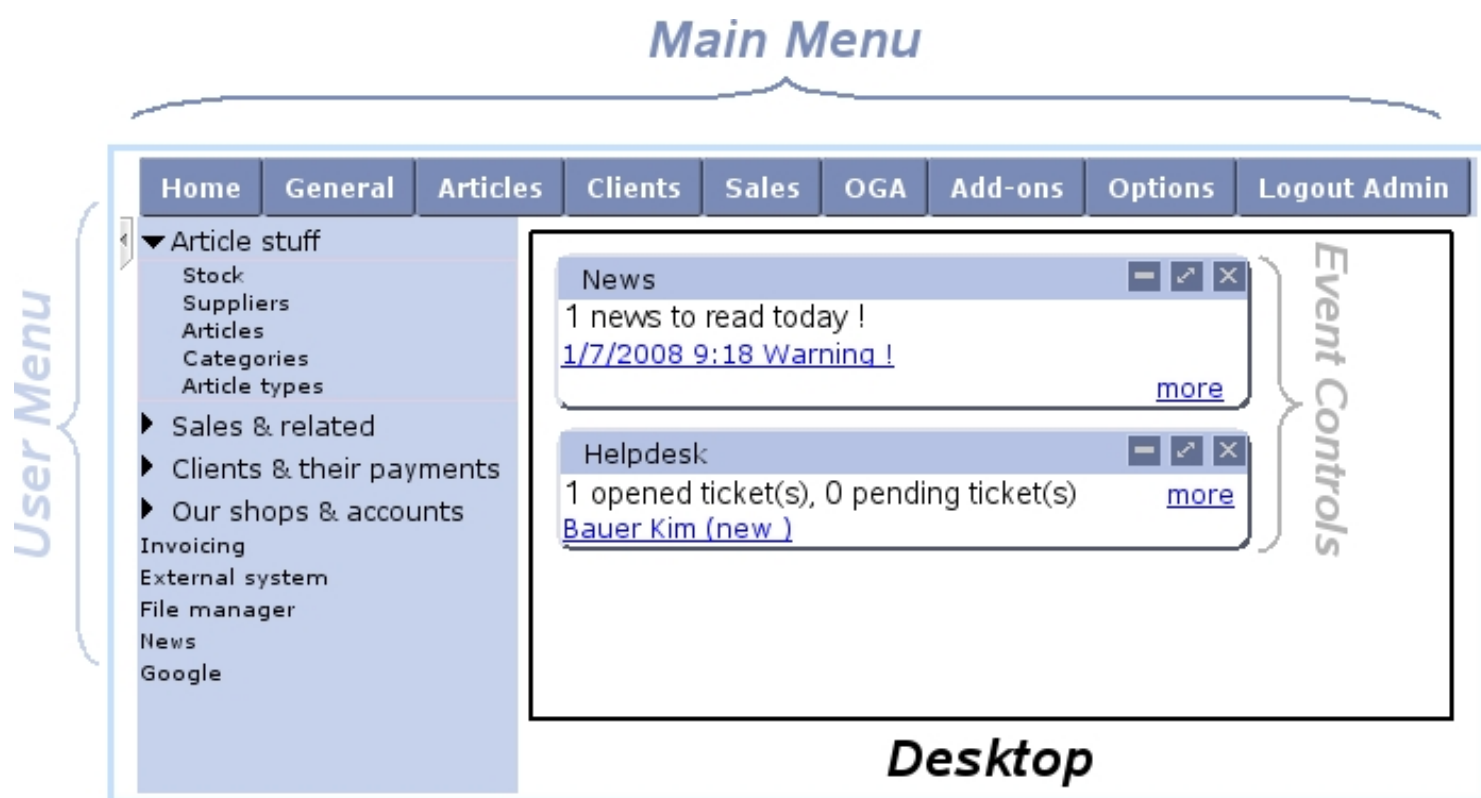


Figure 1.1: Blue Chameleon's screen.

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**.

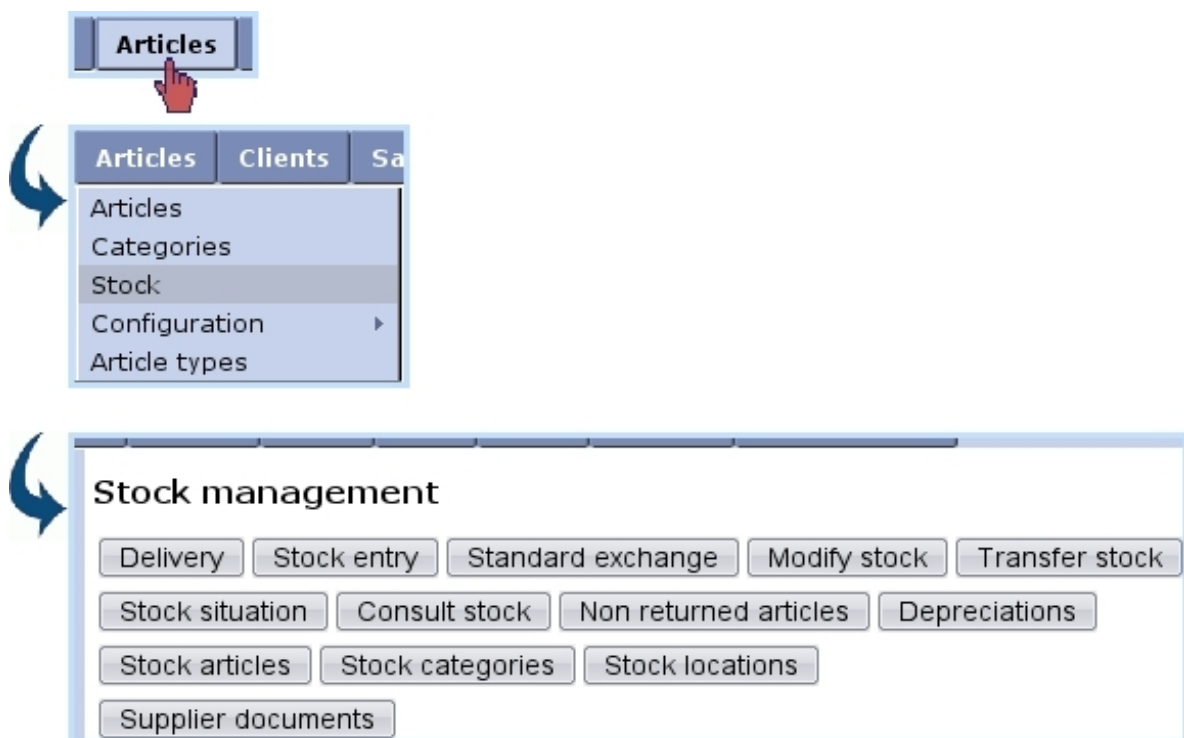


Figure 1.2: Easily accessing a page.

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* (C).

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]

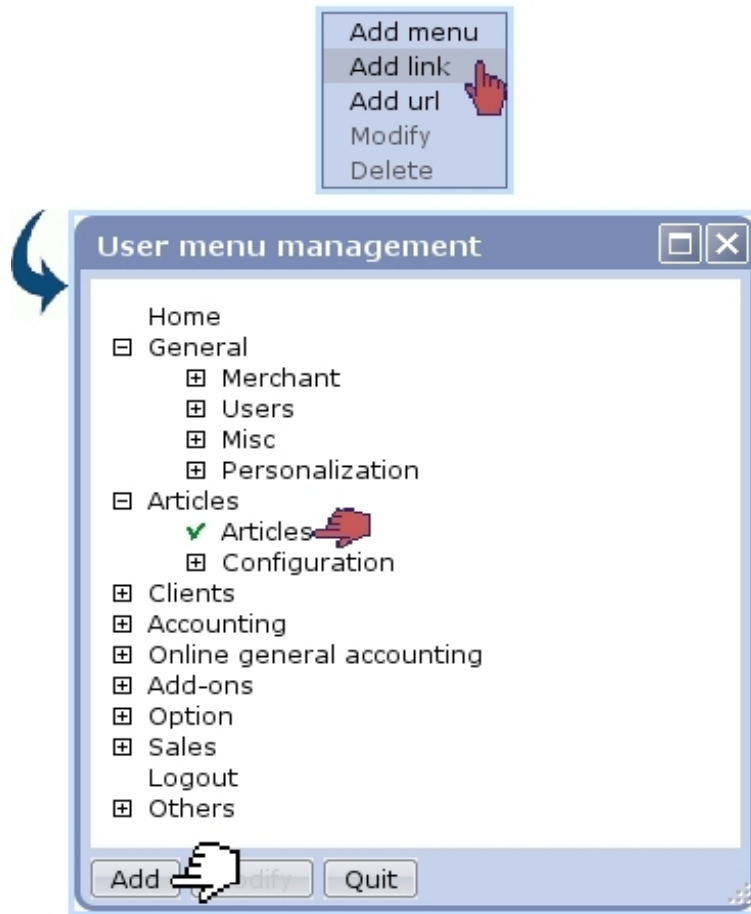


Figure 1.3: Adding the menu element 'Articles' to the User Menu.

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.

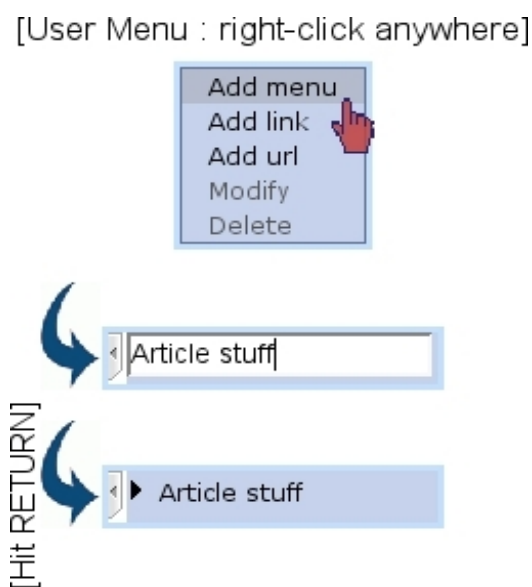


Figure 1.5: The creation of a User Menu menu called 'Article Stuff'.

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.

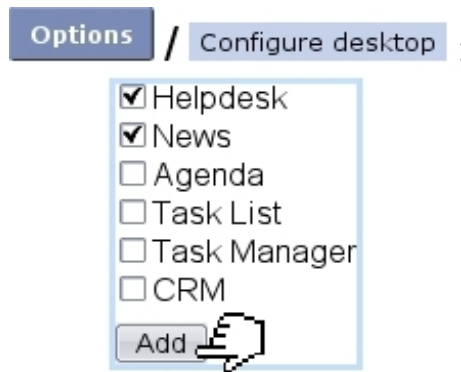


Figure 1.7: Setting the display with 'Helpdesk' and 'News' Event Controls.

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.

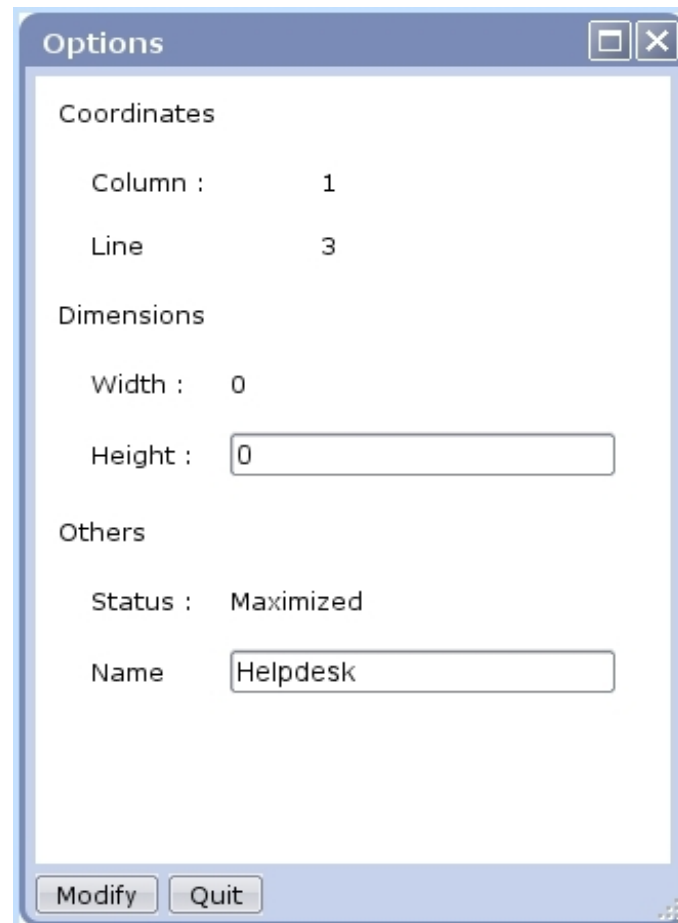

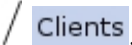


Figure 1.8: This pop-up enables to fix an Event Control's name and height.

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 (B.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 (B.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="<none>"/> ▾	
Billing:	<input type="text" value="Ok"/> ▾	
SLA:	<input type="text" value="Normal"/> ▾	
External account:	<input type="text" value="< Default >"/> ▾	
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

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

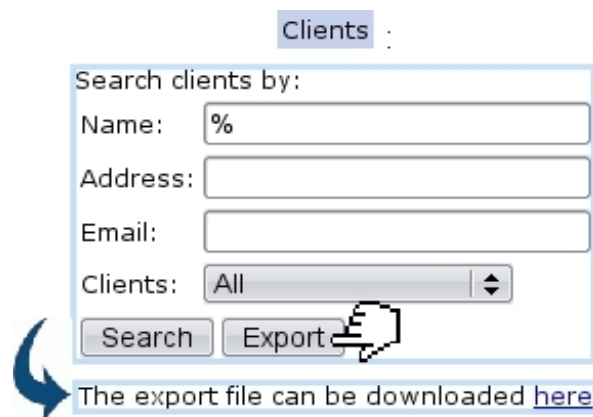


Figure 2.5: Generating an export file for all registered clients (as generated by using % character in the 'Name:' field).

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

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

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.

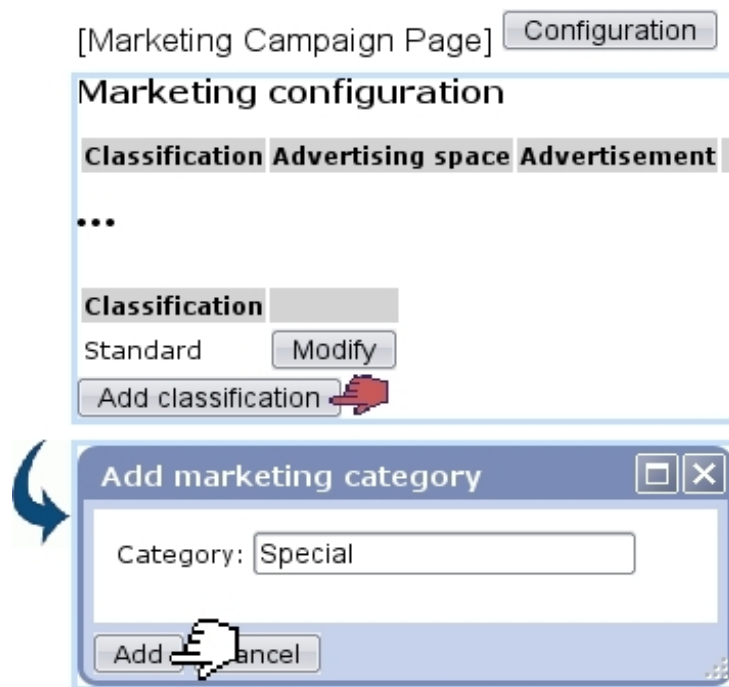
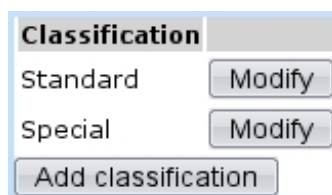


Figure 2.11: Adding the marketing category.

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.

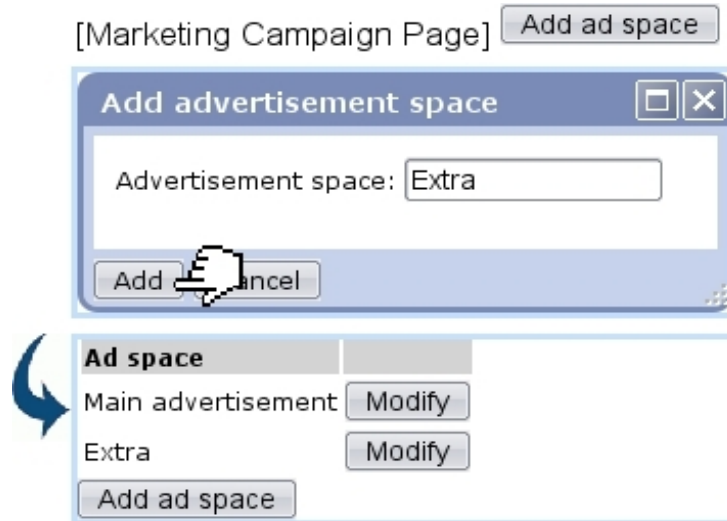


Figure 2.12: Adding an advertisement space.

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** :

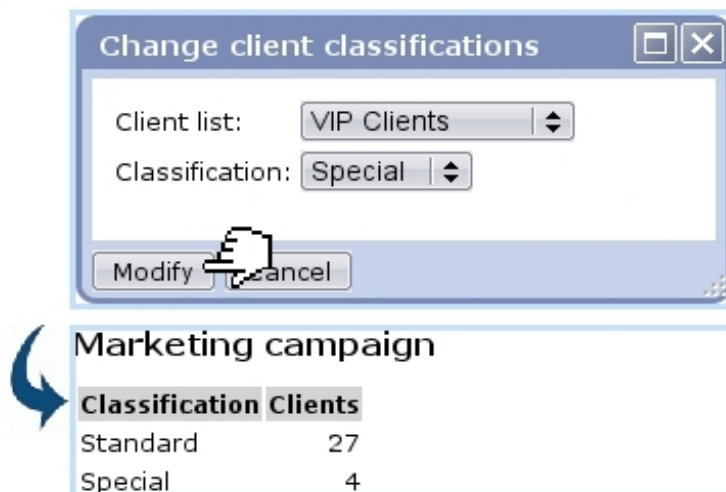
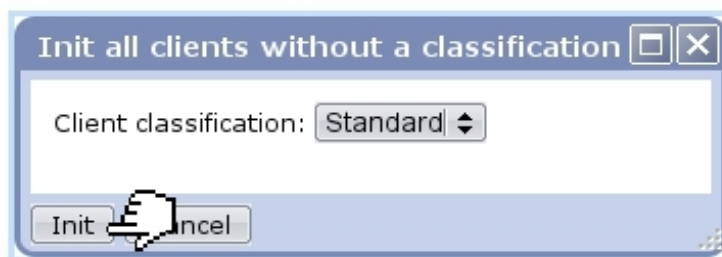


Figure 2.13: Putting the clients in a specific client list in a marketing category.

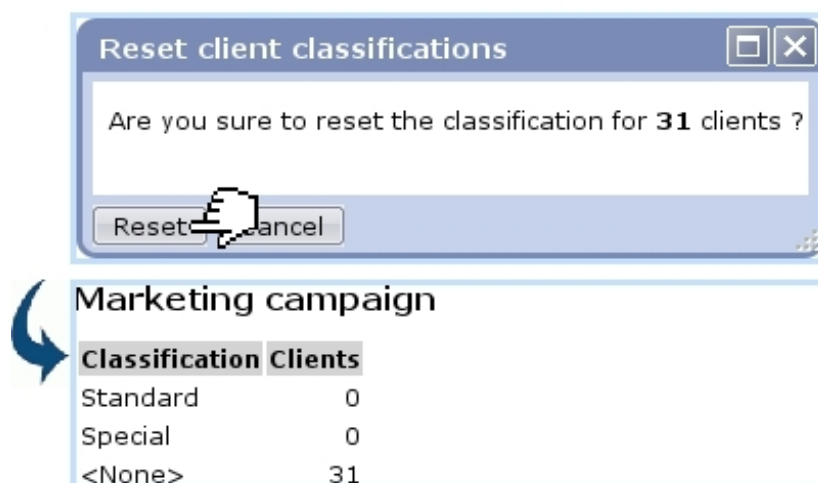
[Marketing Campaign Page] **Init all clients without a classification** :



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 (B.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* (B.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 English :	Crackers
...for language French :	
...for language German :	
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

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

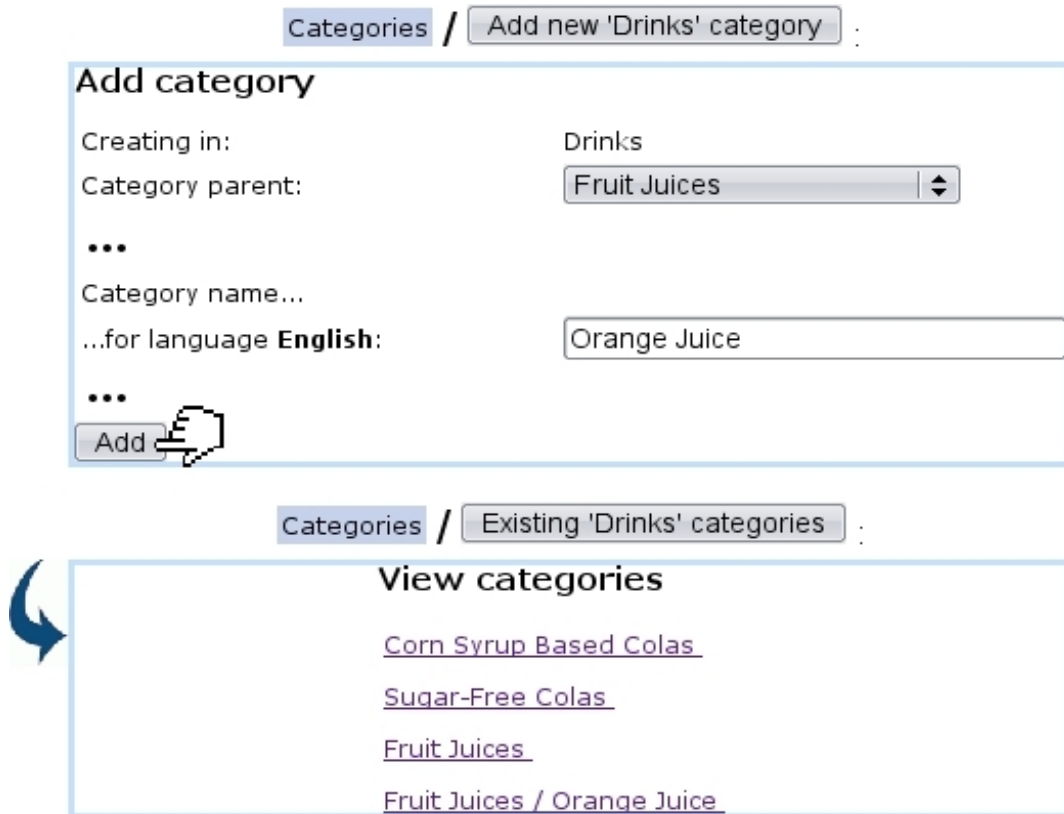


Figure 3.9: Creating another level of classification.

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.

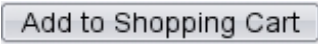
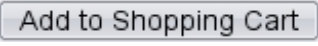
3.3.4.2.1 Article ordering level Category creation includes an 'Article ordering level:' menu that includes 'Front-office and back-office level 0', as well as different levels of back-office.

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).

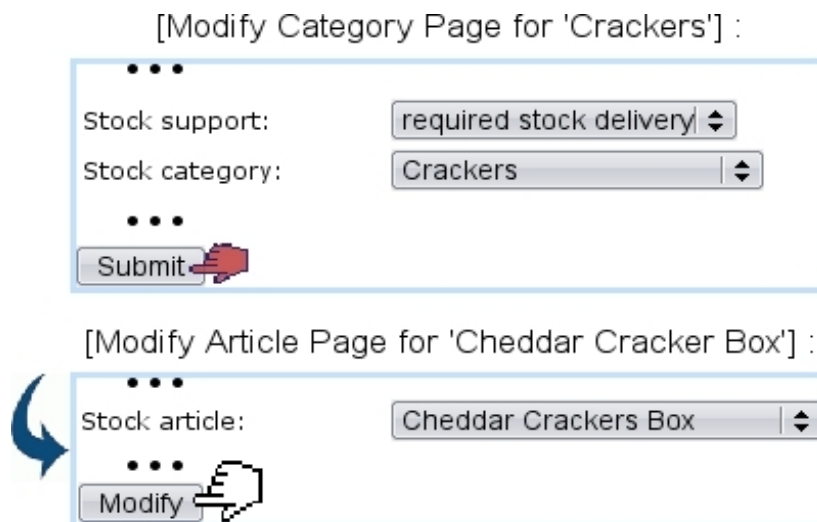


Figure 3.10: Once a category enables stock support, the articles that depend from it provide a menu where they can be associated with a stock article.

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.

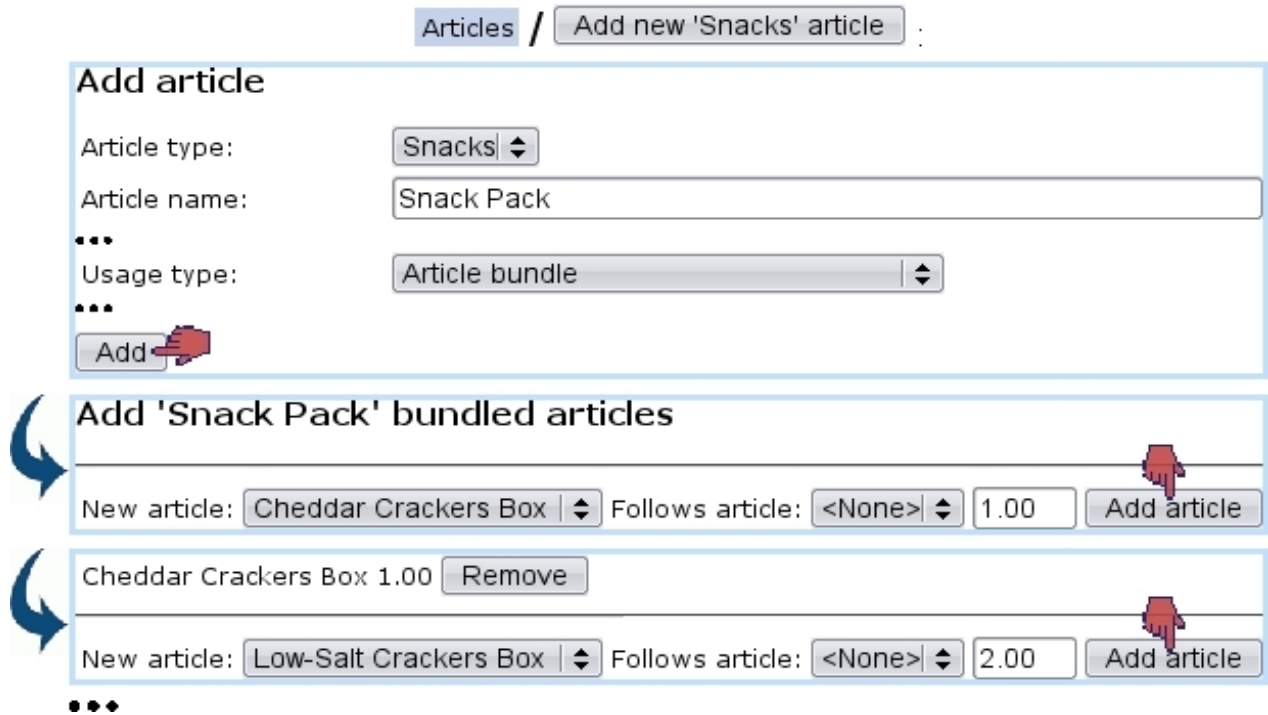


Figure 3.11: Creating an 'article bundle' : various articles are picked and gathered.

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	<input type="button" value="Remove"/>
Tomato-Flavored Crackers Box	0.80	<input type="button" value="Remove"/>
Cheddar Crackers Box	1.00	<input type="button" value="Remove"/>

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 (B.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 (B.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* (B.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.

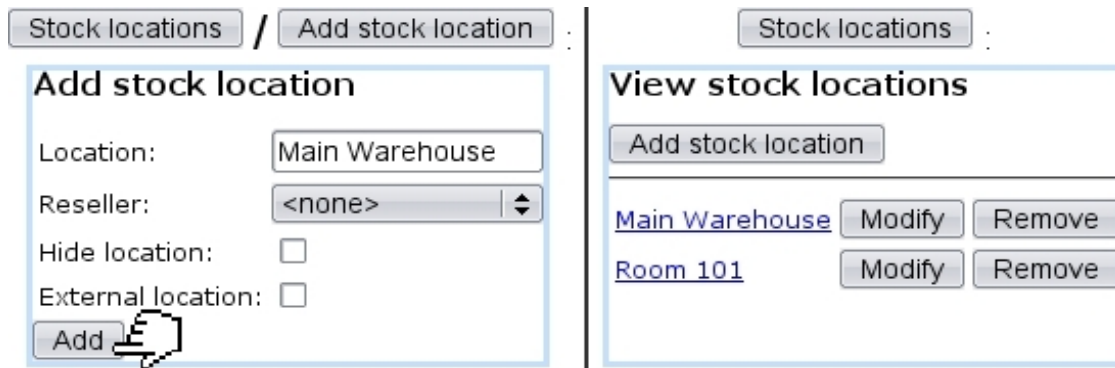



Figure 3.15: Creating and viewing stock locations.

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 (B.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 *: Food Corps, Ltd

Contact person: Harland Sanders

Address line 1 *: 1 Apple Street

Address line 2:

Address line 3:

Zip code * / City *: 90000 Los Angeles

Country *: USA

VAT #: VAT 123456

Tel. * / Fax: 555 6789

E-mail address: deliveries@foodcorps.ltd

Add 

(*) required

Figure 3.16: Adding a supplier.

Suppliers / Add new supplier

 [Food Corps, Ltd](#) Modify Remove

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

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) ;

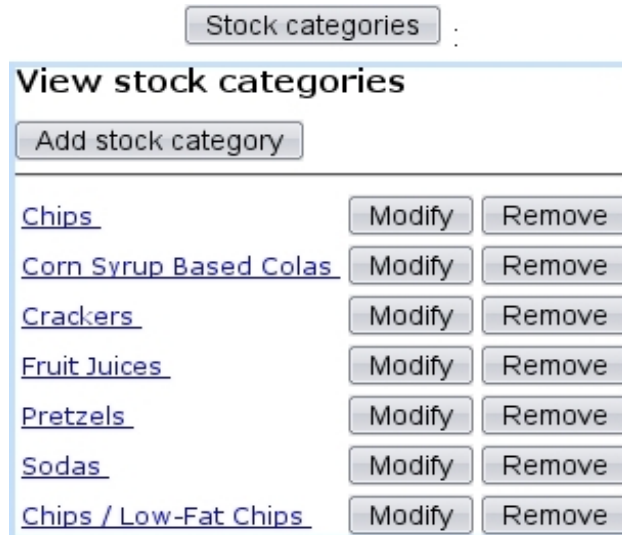


Figure 3.19: Displaying current stock categories.

- 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 type="text" value="Food Corps, Ltd"/>	<input type="text" value="0.75"/>	<input 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
Cheddar Crackers Box	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 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

Box 2 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 (B.2) under the element

Supplier document access rights

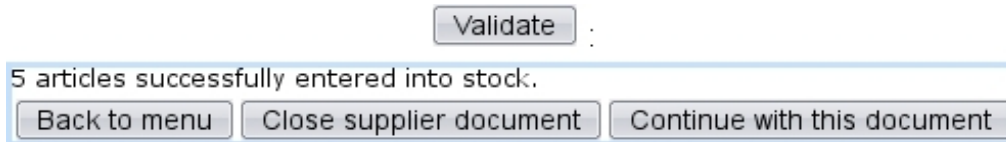


Figure 3.24: The conclusion screen after having successfully created a new stock entry.

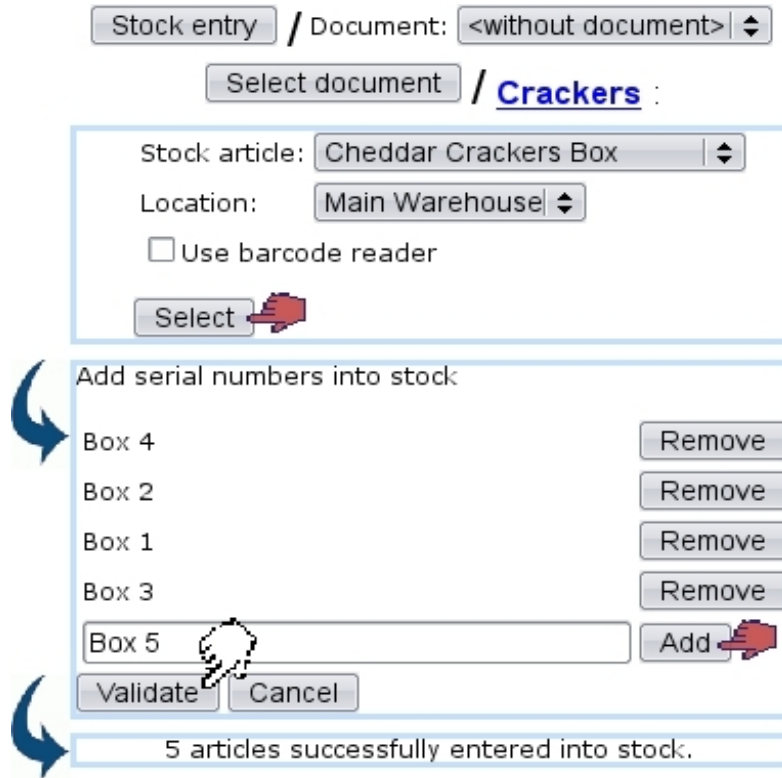


Figure 3.25: The whole process to greet a stock entry for article *Cheddar Crackers Box*, with suppliers 'disabled'.

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	REFC9900	9	opened	<input type="button" value="Close document"/> <input type="button" value="Modify"/>
27/5/2010	Food Corps, Ltd	REFC9876	3	opened	<input type="button" value="Close document"/> <input type="button" value="Modify"/>
8/10/2009	Food Corps, Ltd	NWDC1234	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"/>	5	Cheddar Crackers Box				<input type="text" value=""/>		
<input type="checkbox"/>	Box 2	27/5/2010	Main Warehouse	sold	0.75	<input type="text" value="0.75"/>	Smith John (Smith.John)	2010052901001
<input type="checkbox"/>	Box 3	27/5/2010	Main Warehouse	sold	0.75	<input type="text" value="0.75"/>	Smith John (Smith.John)	2010052901001
<input type="checkbox"/>	Box 4	27/5/2010	Main Warehouse	sold	0.75	<input type="text" value="0.75"/>	Smith John (Smith.John)	2010052901001
<input type="checkbox"/>	Box 5	27/5/2010	Room 101	removed	0.75	<input type="text" value="0.75"/>		
<input type="checkbox"/>	Box 8	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.

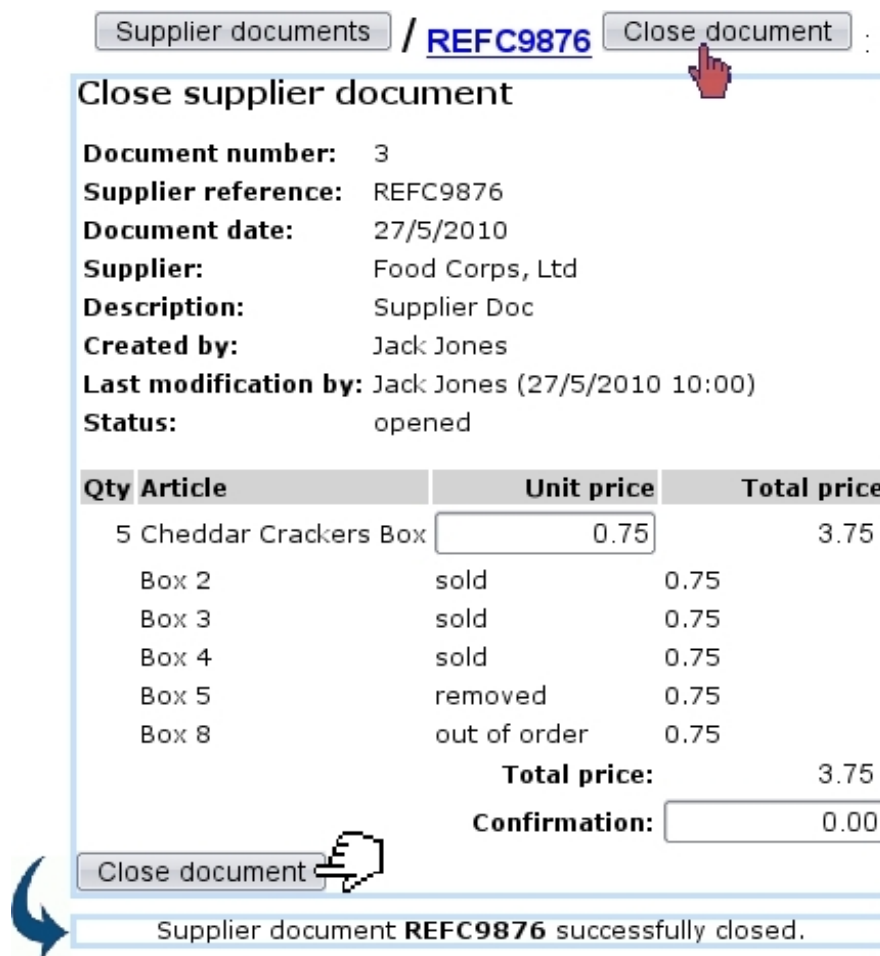


Figure 3.28: Closing a supplier document.

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.

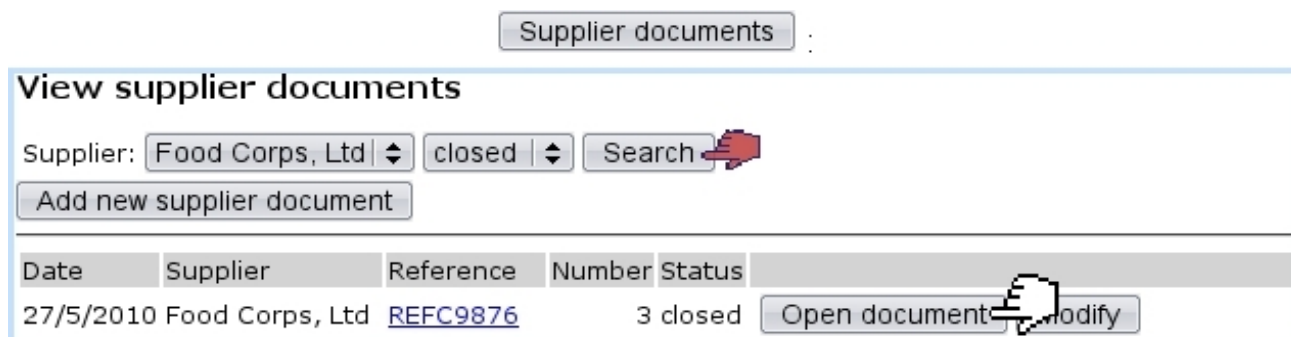


Figure 3.29: Reopening the supplier document as previously closed.

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.

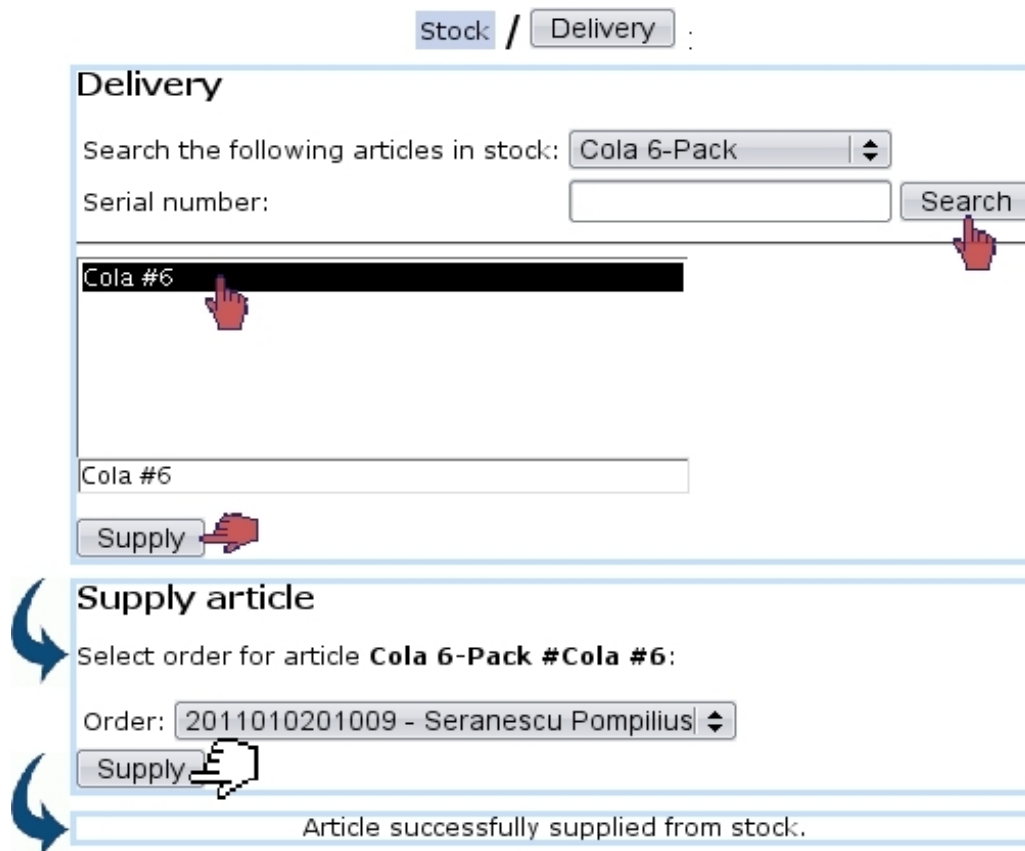

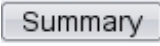


Figure 3.30: Using stock items to supply a particular order.

3.6.5 Managing stock items

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

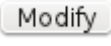
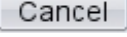
3.6.5.1 Stock summary

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		
Cheddar Crackers Box	39	47	3	50	11	50
Tomato crackers	11	7	0	7	-4	7
Total	50	54	3	57	7	57

Stock summary for article Cheddar Crackers Box

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

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 :

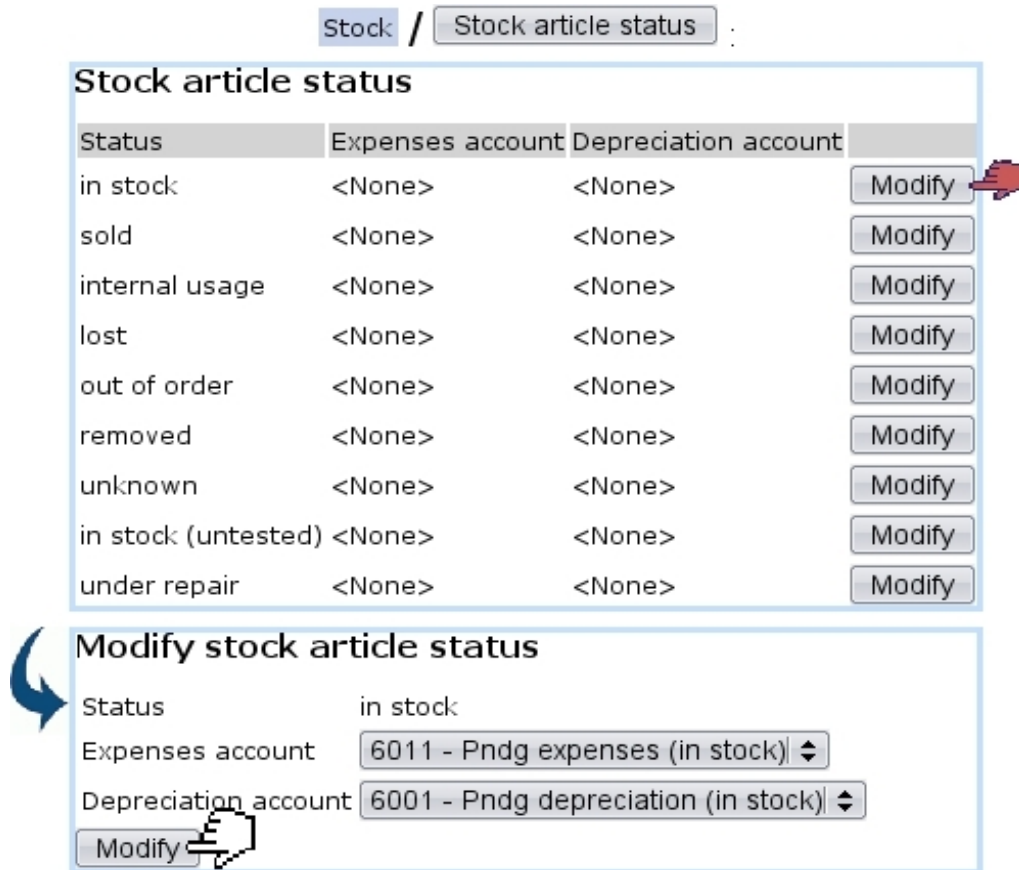


Figure 3.32: Associating a stock status with expenses and depreciation accounts.

- 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...	Box 3 (4)	0.75	0.75	27/5/2010	sold	29/5/2010	[Orders and clients as click-links]	
<input type="checkbox"/>	Cheddar...	Box 2 (4)	0.75	0.75	27/5/2010	sold	29/5/2010		
<input type="checkbox"/>	Cheddar...	Box 4 (4)	0.75	0.75	27/5/2010	sold	29/5/2010		
Total			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	Smith John	2010052901001	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
Gizmo					
<input type="checkbox"/>	Type 242-1	16/2/2011	16/2/2011	50.00	50.00
<input type="checkbox"/>	Type 242-2	16/2/2011	16/2/2011	50.00	50.00
<input type="checkbox"/>	Type 242-3	16/2/2011	16/2/2011	50.00	50.00
			3	150.00	150.00
Pocket-sized McGuffin					
<input type="checkbox"/>	Id 23	9/2/2011	9/2/2011	29.90	29.90
<input type="checkbox"/>	Id 24	9/2/2011	9/2/2011	29.90	29.90
			2	59.80	59.80
			5	209.80	209.80

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).

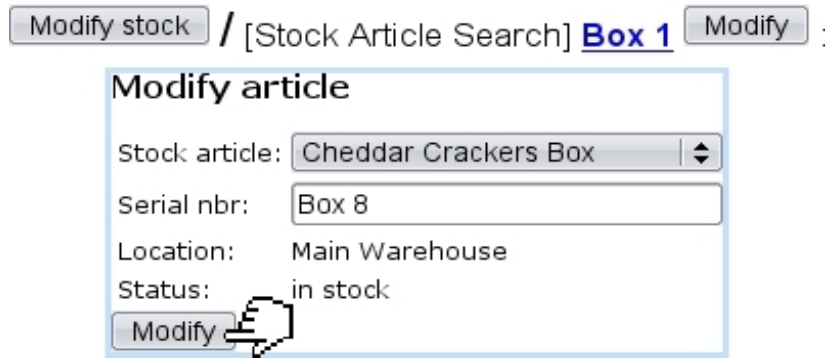


Figure 3.36: Changing the serial number of a stock item.

3.6.5.6 Stock article statuses

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

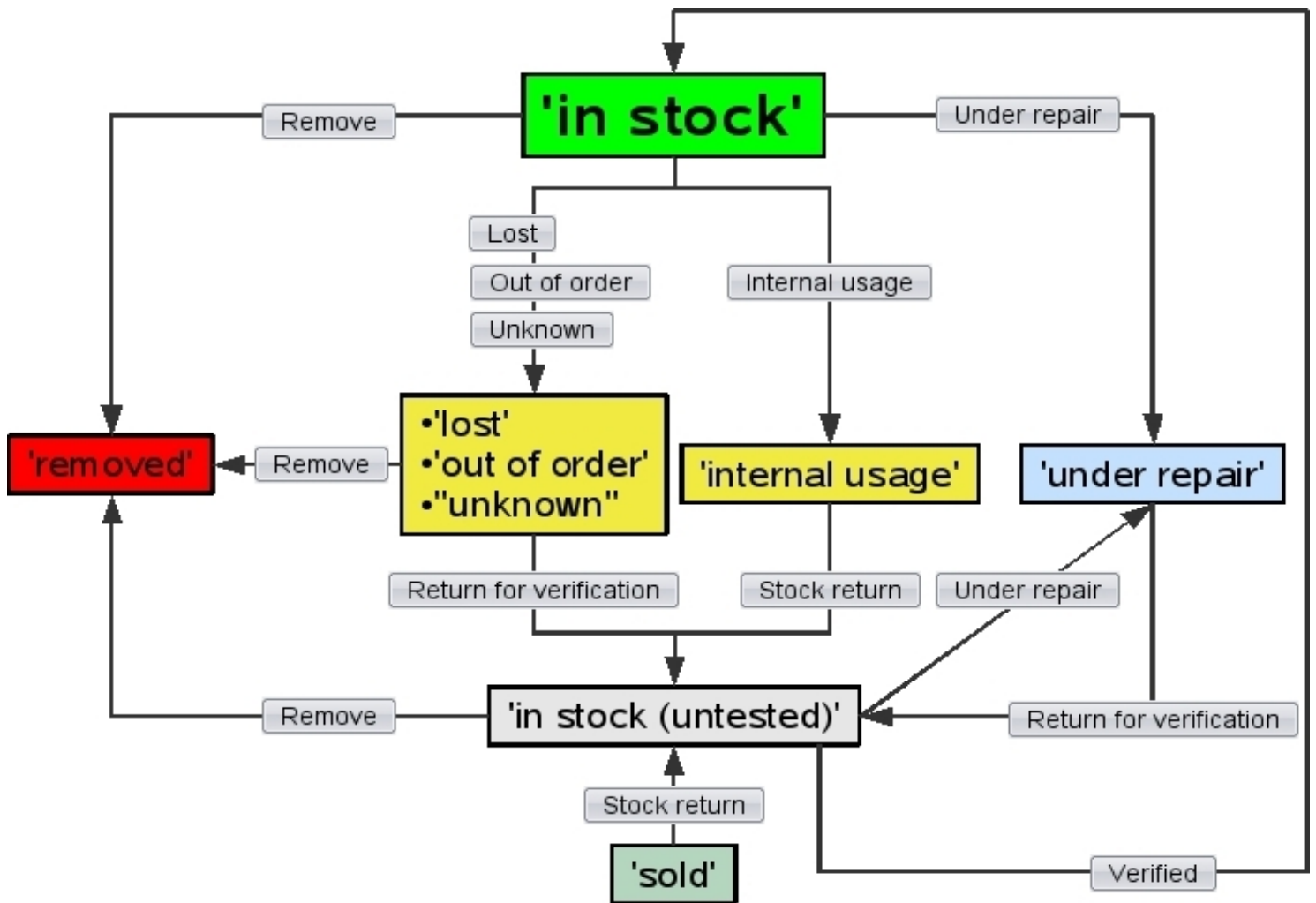
- 'in stock', available for each stock location (3.6.1.1), for instance 'in stock (Main Warehouse)';
- 'in stock (untested)', for articles that had been returned to stock (3.6.5.9) but have not been verified (3.6.5.11) yet ;
- 'sold', for ordered and delivered items ;
- six other statuses ('under repair', '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.

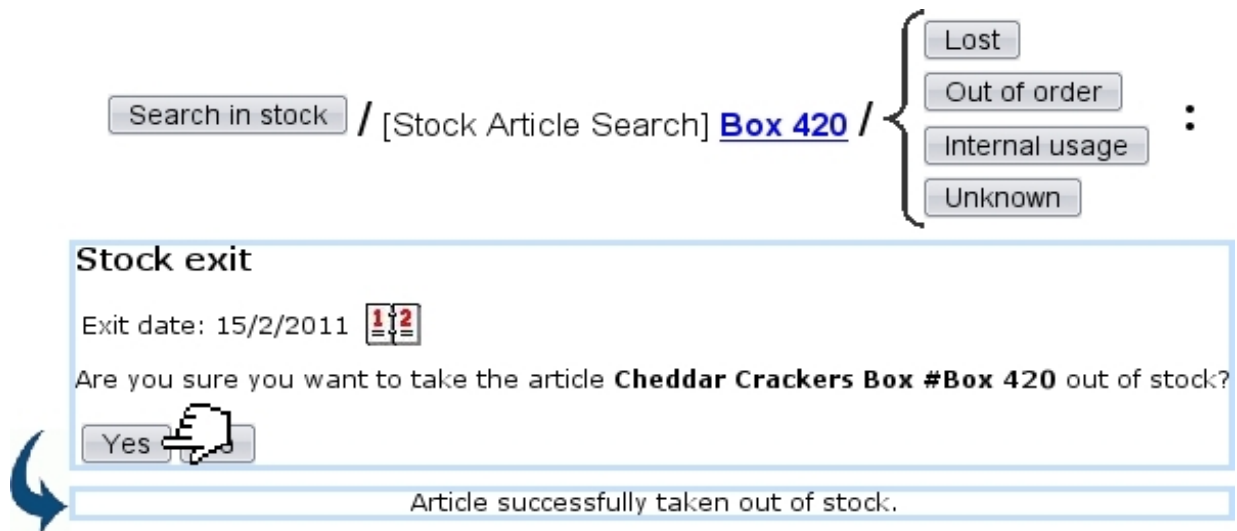



Figure 3.37: Taking a stock item out of stock (not irreversibly), from four possible causes.

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) ...

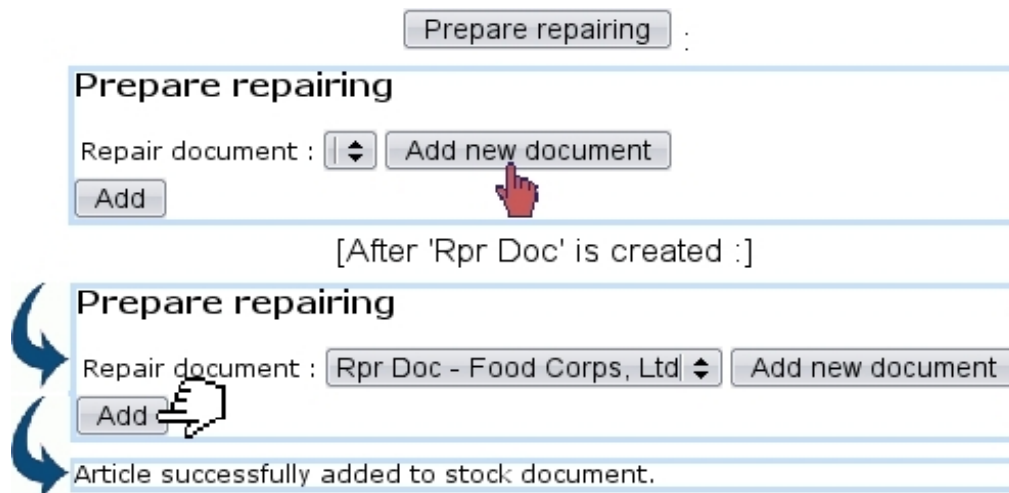


An item can also be returned from the Shop Sale Page (4.6.4).

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' (B.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**.

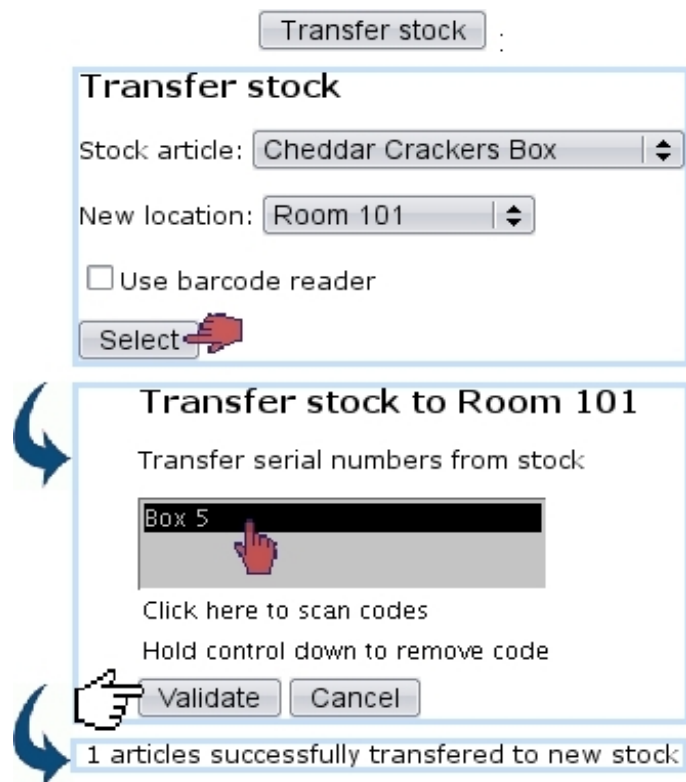


Figure 3.39: Transferring a stock item from one location to another.

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**.

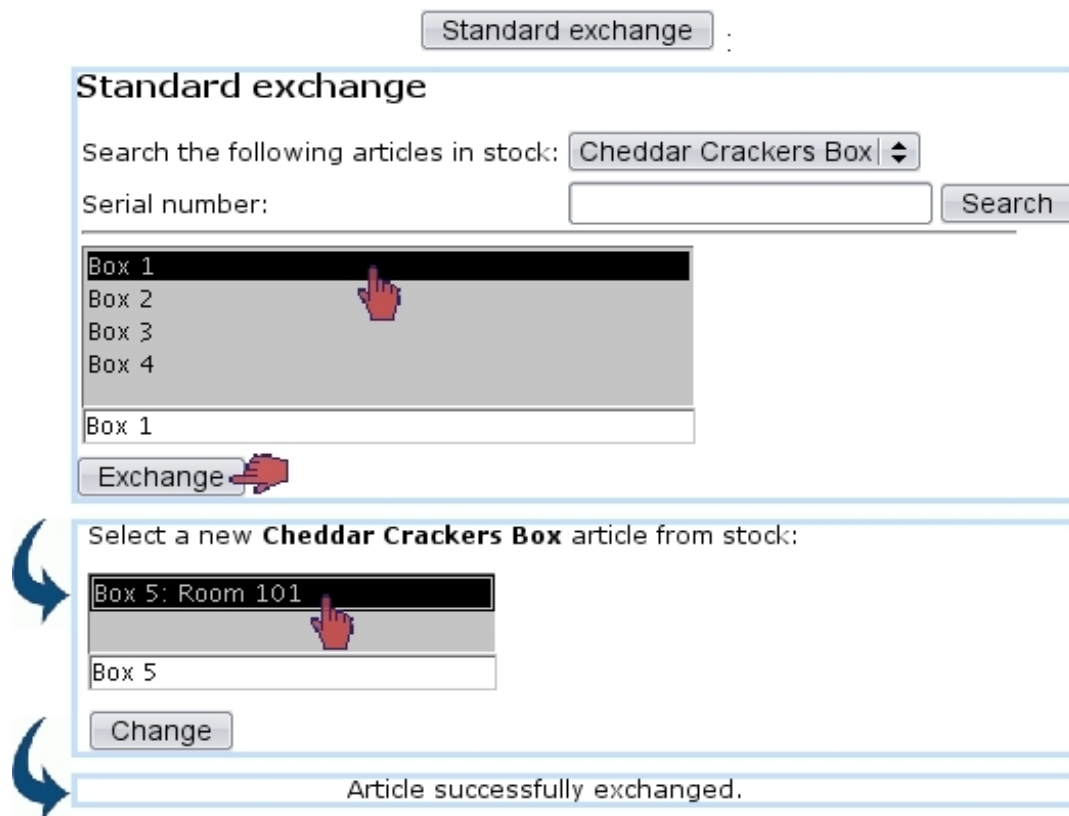


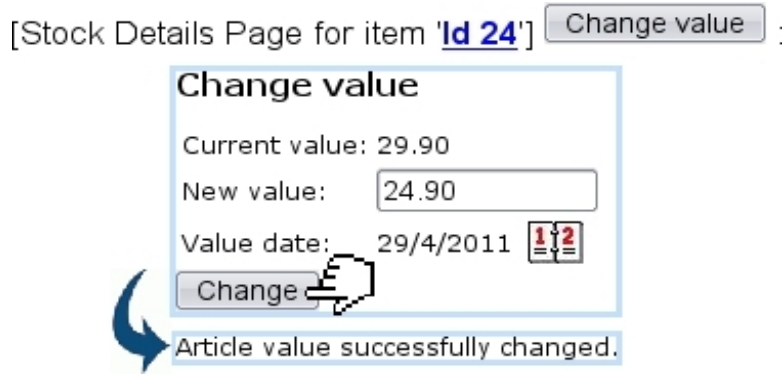
Figure 3.40: Exchanging the respective locations of two stock items.

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	Doc Tsf 1	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
Id 24	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
Id 24	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 D.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)			
Serial number	Article	Stock entry	Location	Status
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* (B.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.

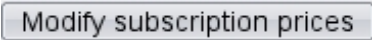
As this new subscription is created, a screen with dedicated subscription options appears as shown at Fig.3.47.

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:

Base validity type:

Base price: (VAT incl.)

Follow-up validity:

Follow-up validity type:

Follow-up price: (VAT incl.)

Minimum duration: months

Maximum duration: months

Billing type:

Order subscription in advance first

Credit control type:

Article SLA:

Validity tolerance:

Tolerance type:

External library data:

Token:

Token data:

	Backoffice	Frontoffice
Configuration script:	<input type="text" value="<None>"/>	<input type="text" value="<None>"/>
View script:	<input type="text" value="<None>"/>	<input type="text" value="<None>"/>
Consumption script:	<input type="text" value="<None>"/>	<input type="text" value="<None>"/>
Event script:	<input type="text" value="<None>"/>	
	<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="<Default>"/>	

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](#) :

At-Home Delivery, 1 Month			
Article type:	At-Home Delivery	Base price:	50.00 USD (1 months)
Category:	At-Home Delivery Subscriptions	Follow-up price:	50.00 USD (1 months)
Subscription price:	50.00 USD	Duration:	1to12month(s)
Usage type:	Subscription	Billing type:	Full billing
Invoices:	Complete invoices for this article	Order:	normal
External account:	<Default>	External free subscriptions account:	<Default>
External expenses account:	<Default>		
Credit note account:	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
2008060901003	Smith John	At-Home Delivery, 1 Month	ordered in advance		
2008060901002	Bauer Kim	At-Home Delivery, 1 Month	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
2008060901006	Durden Tyler	At Home (...)	suspended	11/6/2008	
2008060901005	Barnes Cletus	At Home (...)	activated	9/6/2008	11/6/2008
2008060901004	Parker Ken	At Home (...)	suspended	9/6/2008	
2008060901003	Smith John	At Home (...)	ordered in advance	15/6/2008	14/7/2008
2008060901002	Bauer Kim	At Home (...)	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

Order number:	2008060901002	Username:	Bauer.Kim
Status:	ordered in advance	Title:	Miss
Start of subscription:	not specified	Name:	Bauer Kim
End of subscription:	not specified	Address:	23 Palmetto Drive 90000 Los Angeles USA
		Current SLA:	Normal

Invoices

Period	Date	Data type	Type	Reference
6/2008	9/6/2008 9:12	subscription	invoice	#2008060901002

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
2008060901003	Smith John	At-Home...	ordered in advance	15/6/2008 14/7/2008
2008060901002	Bauer Kim	At-Home...	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
Block :	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 / (Fig.3.61).

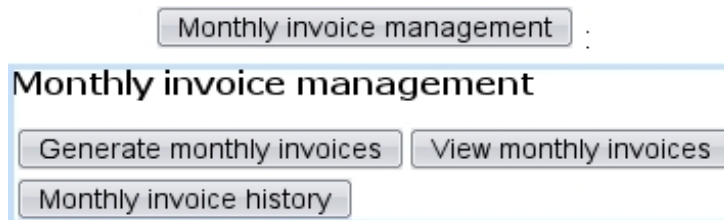


Figure 3.61: The *Monthly Invoice Management Page*, with buttons designed to accomplish any action related to subscription monthly invoices.

3.7.2.1 Generating monthly invoices

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

[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	Details

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.

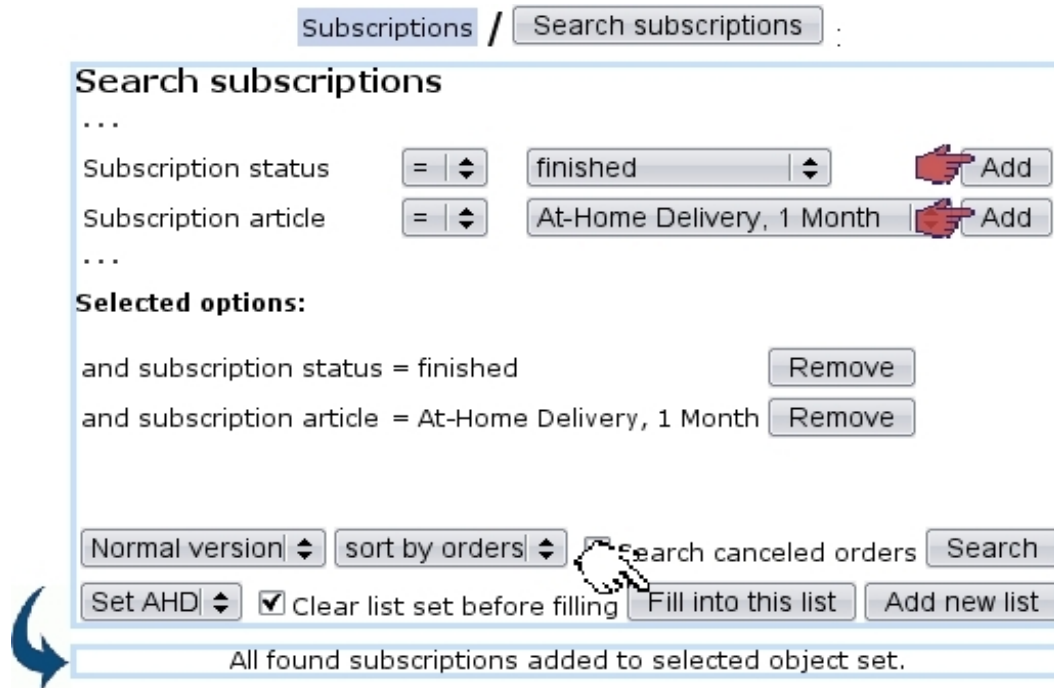


Figure 3.67: Adding finished 'At-Home Delivery, 1 Month' subscriptions to set 'AHD'.

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).



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 (B.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.

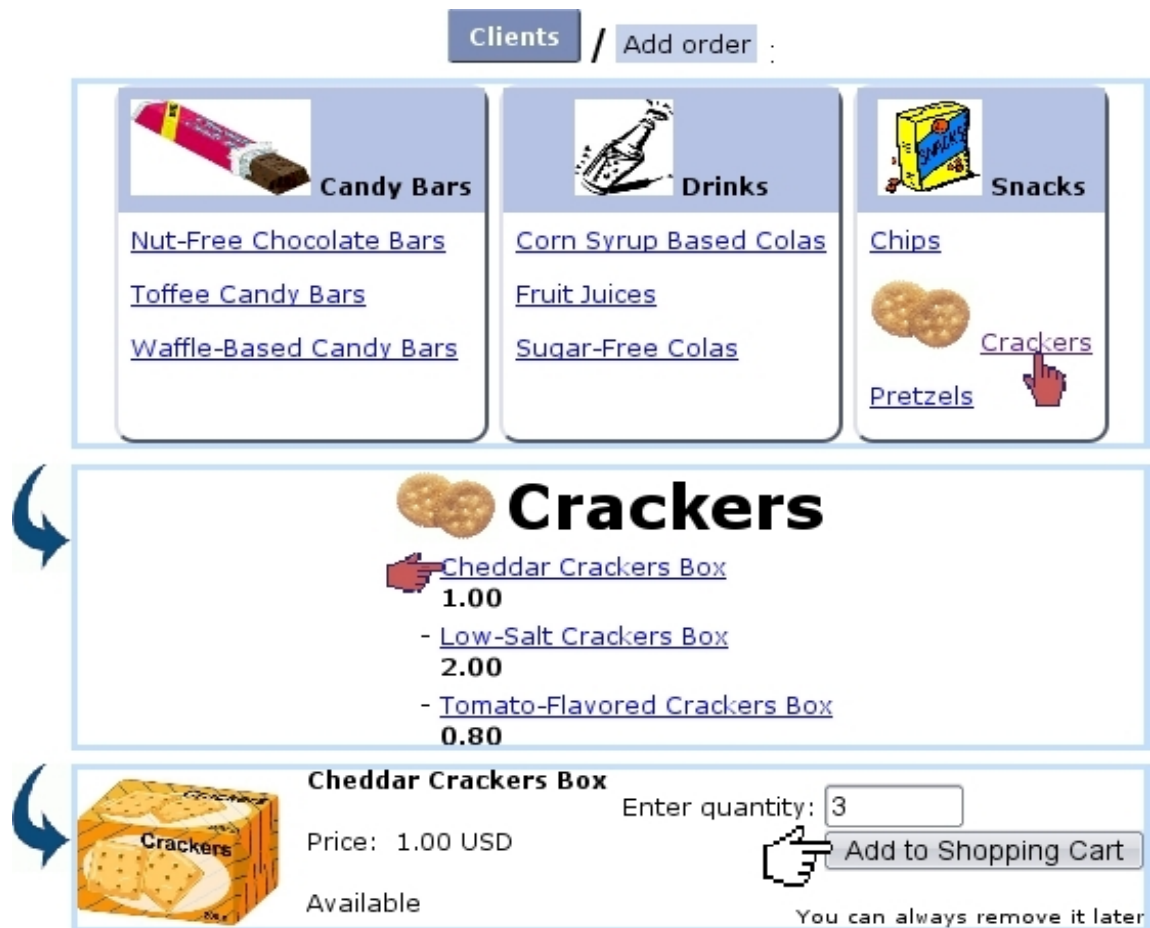


Figure 4.1: Preparing an order of 3 *Cheddar Crackers Boxes*.

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: 29 - 5 - 2010

Salesperson: Dick

Title : Mr

Name * : Smith

First name : John

Address : 12 Orange Road

Zip code * / City : 90000 Los Angeles

Country * : USA

Phone / Office : 555 1234

Mobile / Fax :

E-mail : john.smith@mailserv.com

Username : Smith.John

(*) required

Delivery method: Pick up order at shop

Payment method: Pay by credit card

Invoice to: Smith John Change...

Invoice delivery method: Send bill by mail

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: Smith John
Invoice delivery method: Send bill by mail

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).

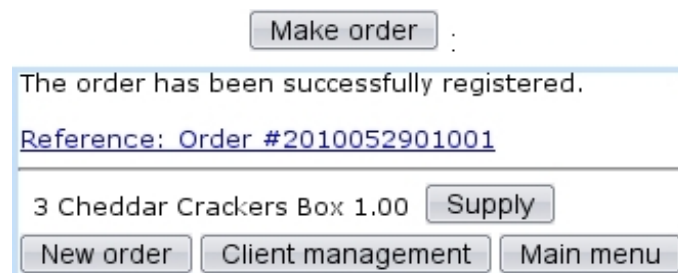
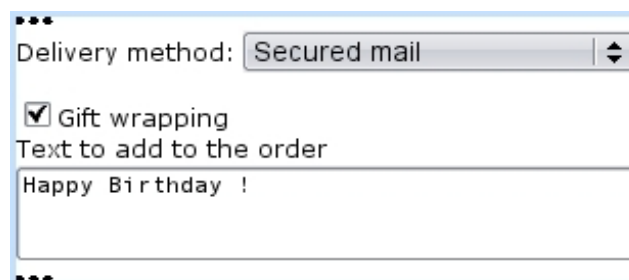


Figure 4.4: Screen confirming that order has been registered.

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 (B.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


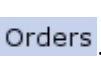
Order statuses that you want to be supported are chosen at the *Merchant Configuration Page (9.1.5)*. Below are listed all of them :

- 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.

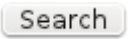
4.2 Searching orders

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

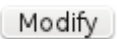
On subsequent page, as shows Fig.4.6, various search criteria can be inputed :

- 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	2010052901001	Smith John	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

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

Article	Qty	Unit price	Total	VAT	Status	Salesperson
Cracker Box	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:	john.smith@mailserv.com
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

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] :

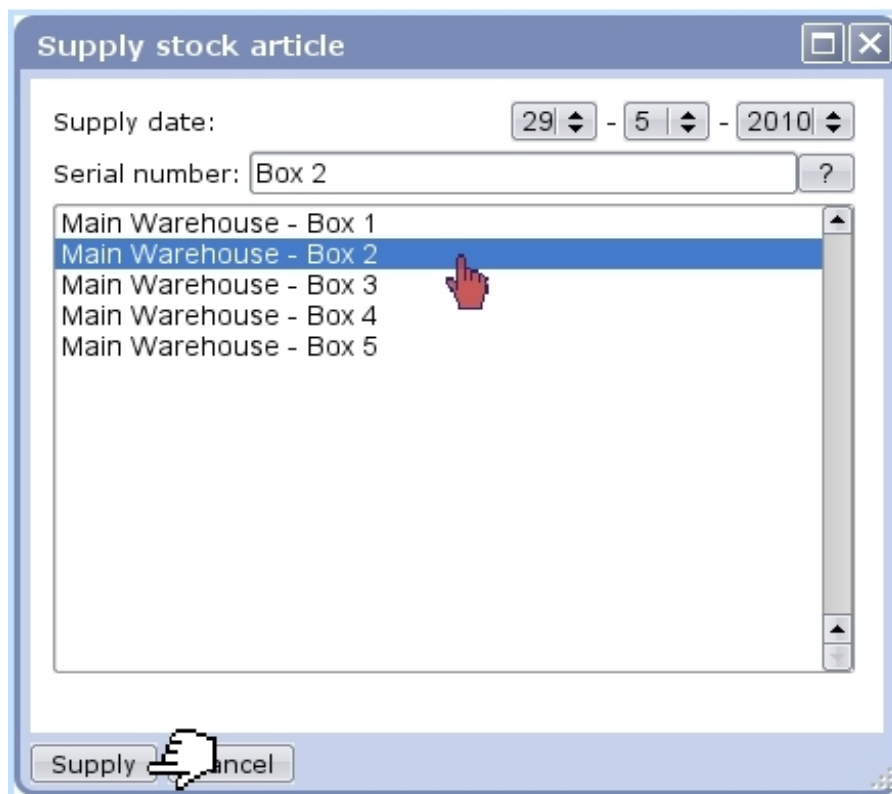


Figure 4.9: Picking stock items from their location to fulfill the order.

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	Box 2	REFC9876	29/5/2010 11:11:36	Jack Jones	delivery	sold	<input type="button" value="Return"/>
Cheddar Crackers Box	Box 3	REFC9876	29/5/2010 11:11:30	Jack Jones	delivery	sold	<input type="button" value="Return"/>
Cheddar Crackers Box	Box 4	REFC9876	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 (B.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.

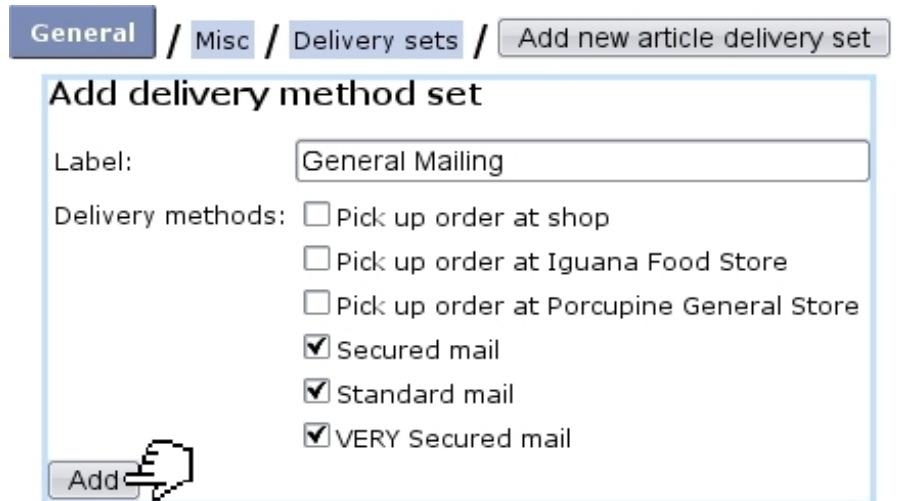
Figure 4.14: The cost details for 'VERY Secured mail' article delivery method.

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', 'Pick up order at Iguana Food Store', 'Pick up order at Porcupine General Store', 'Secured mail', 'Standard mail', and 'VERY Secured mail'. The last three are checked. An 'Add' button with a hand cursor is at the bottom left of the form.

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

Search client Default client	<p>Sale</p> <p>Salesperson: Dick</p> <p>Delivery</p> <p>Delivery method: Pick up order at Iguana Food Store</p> <p>Payment</p> <p>Payment method: Cash payment</p> <p>Invoicing</p> <p>Invoice delivery method : <None></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 article

Search articles

Article name:	<input type="text" value="6-Pack"/>	Code:	<input type="text"/>
Article type:	<All types>	Status:	<All>
Category:	<All categories>		

Article	Category	Price
6-Pack	Sodas	3.00 USD

Sale

Salesperson:

Delivery

Delivery method:

Payment

Payment method:

Invoicing

Invoice delivery method:

Article	Category	Serial number	Quantity	Unit price	Total price	
6-Pack	Drinks/ Sodas		1	3.00 USD	3.00 USD	<input type="button" value="-"/> <input type="button" value="+"/>
			Total 20.00%:		3.00 USD	
			Total to pay :	1	3.00 USD	

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	Delivery				
Name :	Bauer Kim	Delivery method:	<input type="text" value="Pick up order at Iguana Food Store"/>			
Address :	23 Palmetto Drive	Payment				
	90000 Los Angeles	Payment method:	<input type="text" value="Cash payment"/>			
	USA	Invoicing				
Phone :	555 4525	Invoice delivery method :	<input type="text" value="<None>"/>			
E-mail :	kim.bauer@mailserv.com	<input type="button" value="Search client"/> <input type="button" value="Default client"/> <input type="button" value="Client management"/>				
Credit control class :	None					
Billing :	First reminder					
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"/>
Balance					-58.00	58.00
Total to be paid:						58.00 USD
						<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	Delivery				
Name :	Bauer Kim	Delivery method:	Pick up order at Iguana Food Store ⬇			
Address :	23 Palmetto Drive	Payment				
	90000 Los Angeles	Payment method:	Cash payment ⬇			
	USA	Invoicing				
Phone :	555 4525	Invoice delivery method :	<None> ⬇			
E-mail :	kim.bauer@mailserv.com					
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	
Total to pay :			1		3.00 USD	
[List of reminded invoices]						
					Total to be paid :	3.00 USD
						<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' (B.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
Gizmo	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* (B.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).

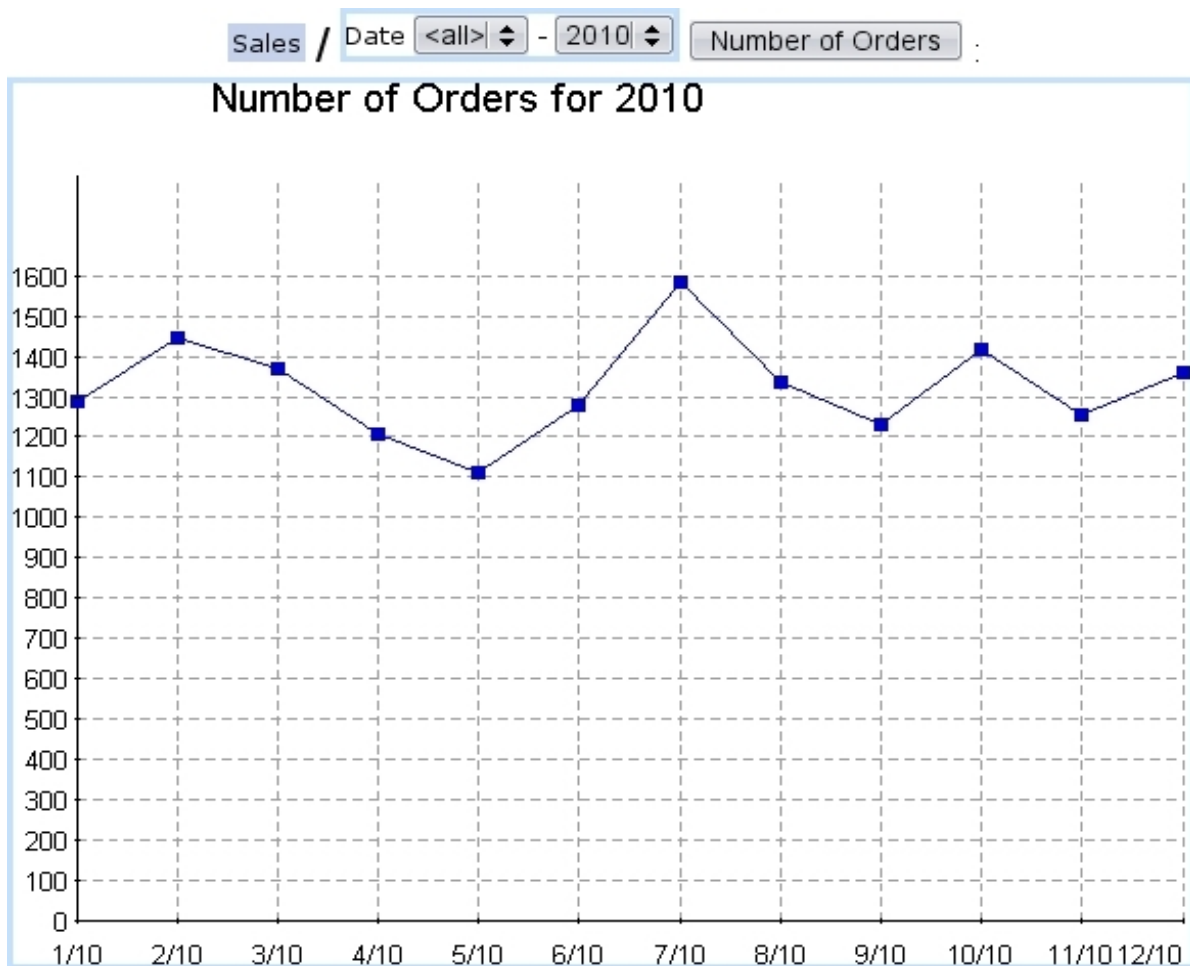


Figure 4.21: Graph showing an example of order evolution, during one year.

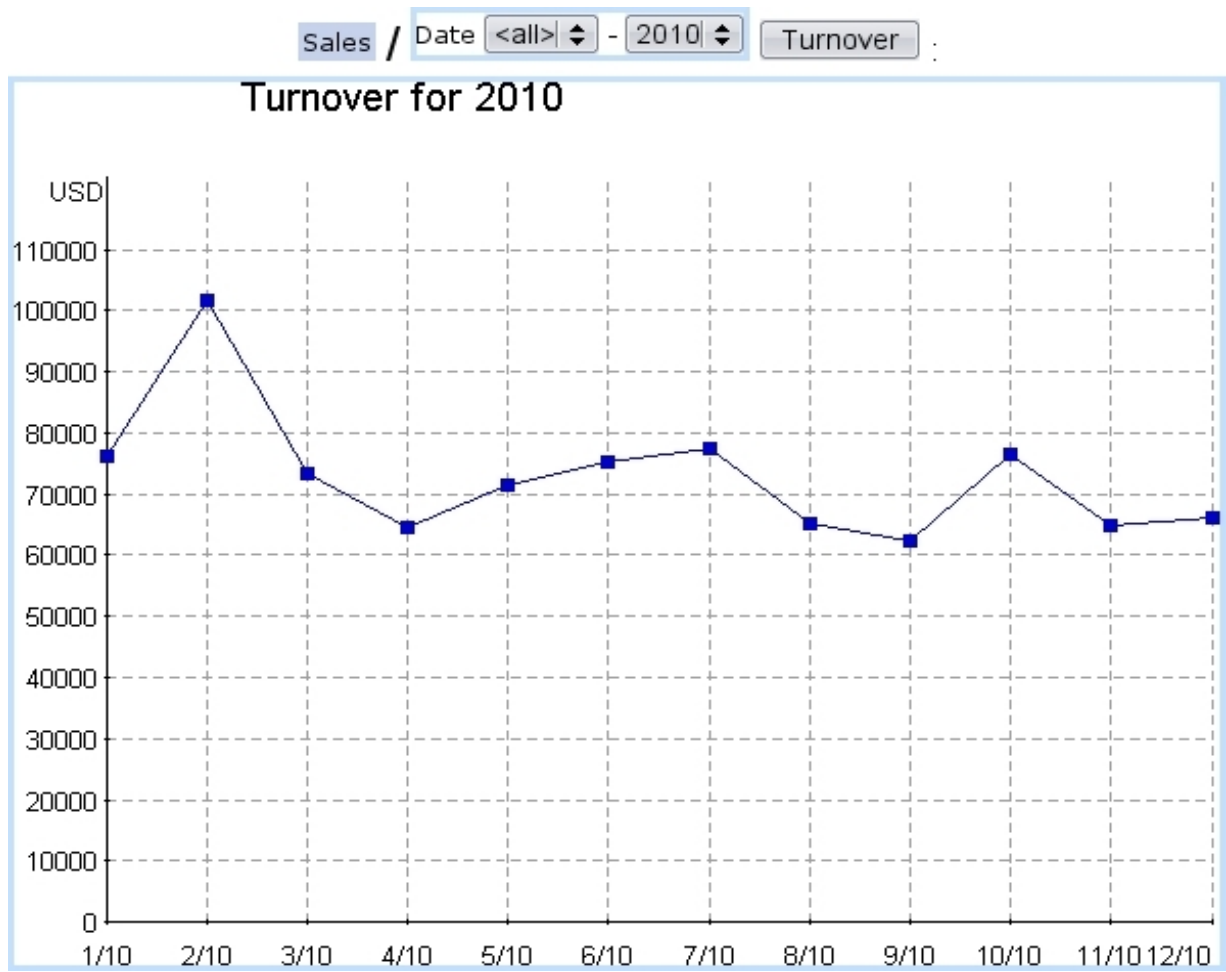


Figure 4.22: Graph showing an example of turnover evolution, during one year.

Sales / Date <all> - 2010 Overview

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

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
1/2010	251	0	0	16	70	0	1022	1359
2/2010	287	0	0	22	83	0	1136	1528
3/2010	293	0	0	19	90	0	1055	1457
4/2010	217	0	0	12	78	0	978	1285
5/2010	181	0	0	26	74	0	906	1187
6/2010	261	0	0	25	80	0	994	1360
7/2010	266	0	0	15	73	0	1304	1658
8/2010	329	0	0	17	71	0	989	1406
9/2010	252	0	0	11	79	0	970	1312
10/2010	368	0	0	16	89	0	1033	1506
11/2010	349	0	0	18	70	0	886	1323
12/2010	435	0	0	18	90	0	906	1449
Total	3489	0	0	215	947	0	12179	16830

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 (B.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**.

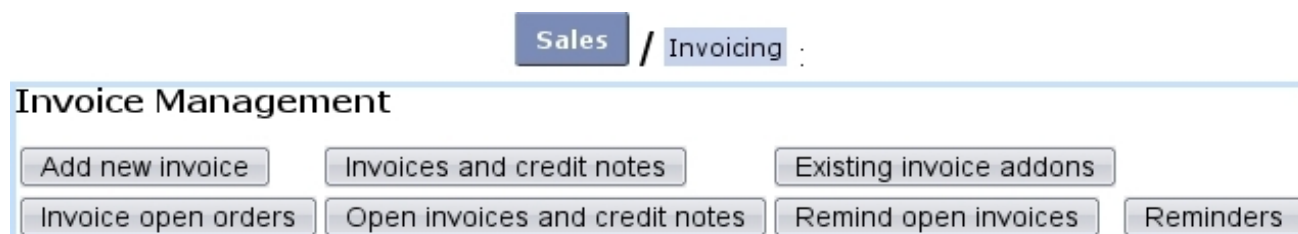


Figure 5.1: The *Invoice Management Page*, with buttons designed to accomplish any invoice-related action.

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"/>
Total			<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
Client name pattern: Smith	Article: <All>	<All>
Status: <Any>	Min./Max. amount: <input type="text"/> / <input type="text"/>	Salesperson: <All>
Display: Invoices	Sort: by date	Version: Normal version

1 invoice(s) found

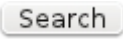

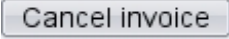
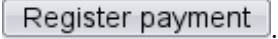
29/5/2010 #2010052901001 Invoice open Smith John Smith.John 3.00	<input type="button" value="Modify"/> <input type="button" value="Cancel invoice"/> <input type="button" value="Register payment"/> <input type="button" value="Register credit note"/>
Total (1): 3.00	

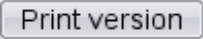
Figure 5.3: The invoice search engine and the results it displays.

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.

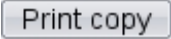
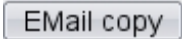
5.3 The *View Invoice Page*

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

Reference: 2010052901001	Username : Smith.John
Value date: 29/5/2010	Title : Mr
Period date: 29/5/2010	Name : Smith John
Status: paid	Address : 12 Orange Road
Order number: 2010052901001	90000 Los Angeles
Export: not exported	USA
Registered by: Richard Malone	Billing : First reminder
Registered by: Richard Malone	

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

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.



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
Total (1):						40.00	

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
Total (1):						40.00	2.40		

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.

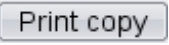
Fig.5.9 features for instance the final result of an invoice printout (as generated by clicking on the button featured on the *View Invoice Page*, 5.3) ; there :

- 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).

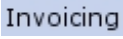
5.5.2 Work sets



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 (B.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
		Total VAT incl. (USD)
We thank you for choosing Retail Food Company !		

Figure 5.9: An example of an invoice printout that uses the Default print model.

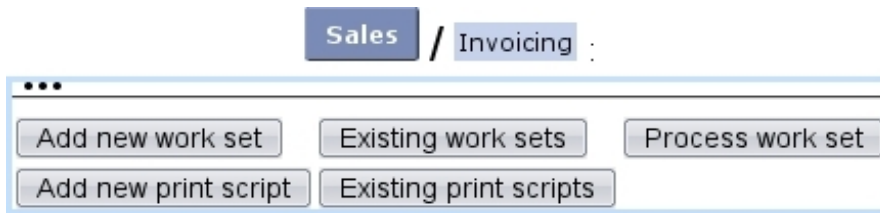


Figure 5.10: These buttons, as available on the *Invoice Management Page*, are designed to accomplish any action related to work sets.

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)

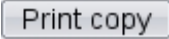
An 'Add' button with a mouse cursor is located at the bottom left of the form.

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.

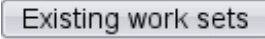
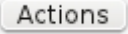
Their 'Content type:' holds three choices :

- 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,
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.

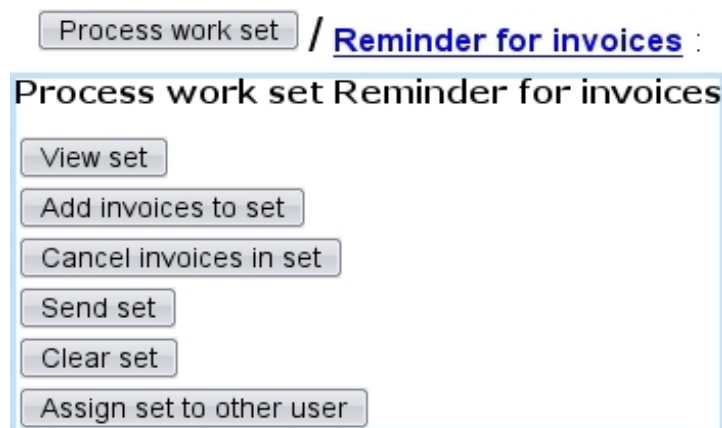


Figure 5.12: The *Work Set Process Page* is designed to accomplish actions on a particular work set.

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	2010120401002	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.

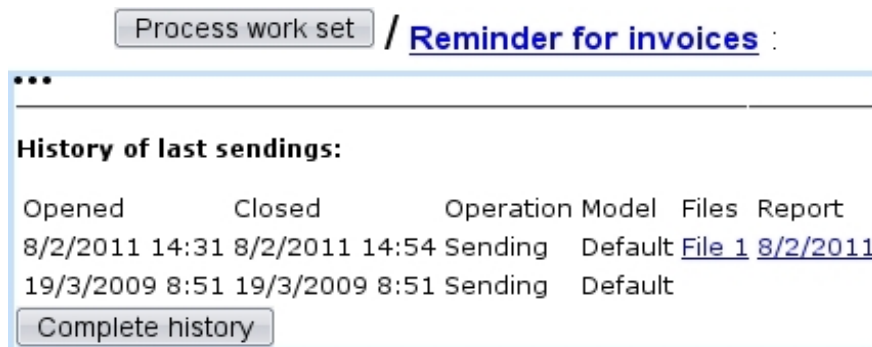
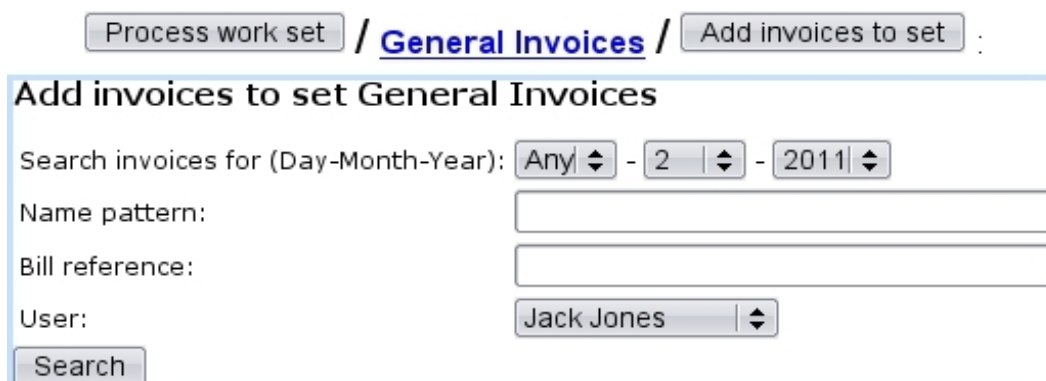


Figure 5.14: The sending of a work set is featured on its *Work Set Process Page*.

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 **EMail 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 (B.2) under the element

Script management

5.5.8 Print models

Print models rely on print templates (D.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.

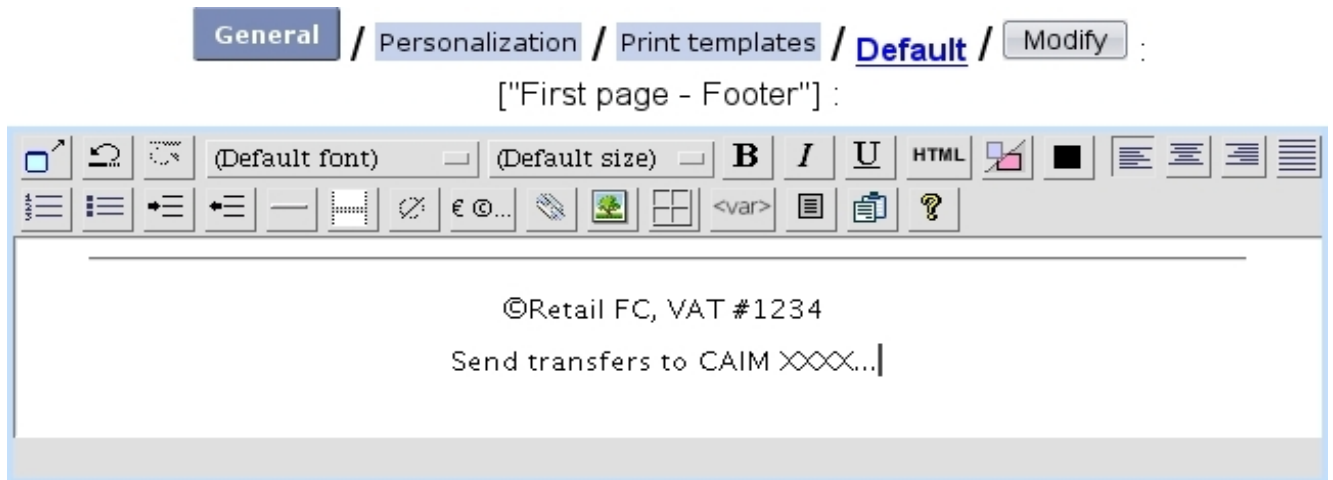



Figure 5.15: Enriching the 'Default' print template, as used by the 'Default invoice model' print model.

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 (B.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.

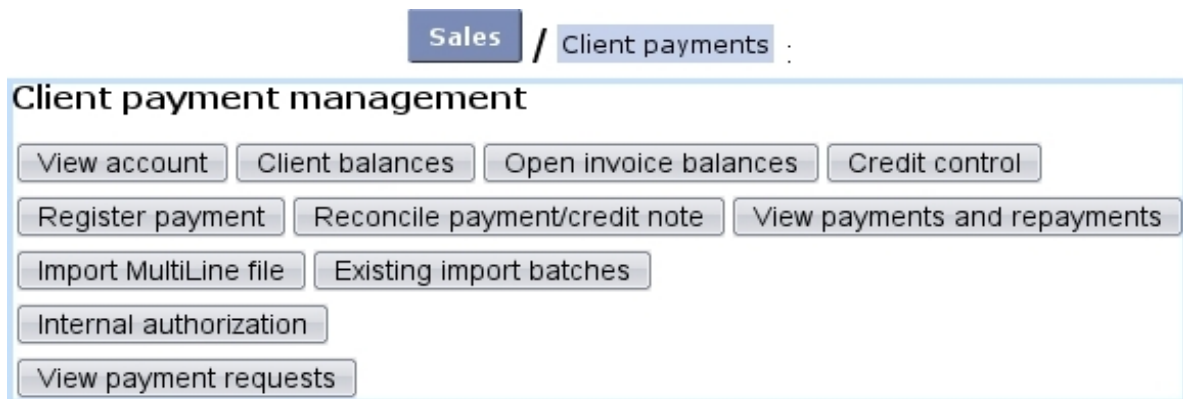


Figure 5.16: The *Client Payment Management Page*, with buttons designed to accomplish any client payment-related action.

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

Reference: 2010052901001	Username: Smith.John
Value date: 29/5/2010	Title: Mr
Period date: 29/5/2010	Name: Smith John
Status: open	Address: 12 Orange Road
Order number: 2010052901001	90000 Los Angeles
Export: not exported	USA
Registered by: 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
Total VAT incl.			3.00		

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
				0.00	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 minimize, maximize, and close buttons. 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 "Credit card type :" section 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.

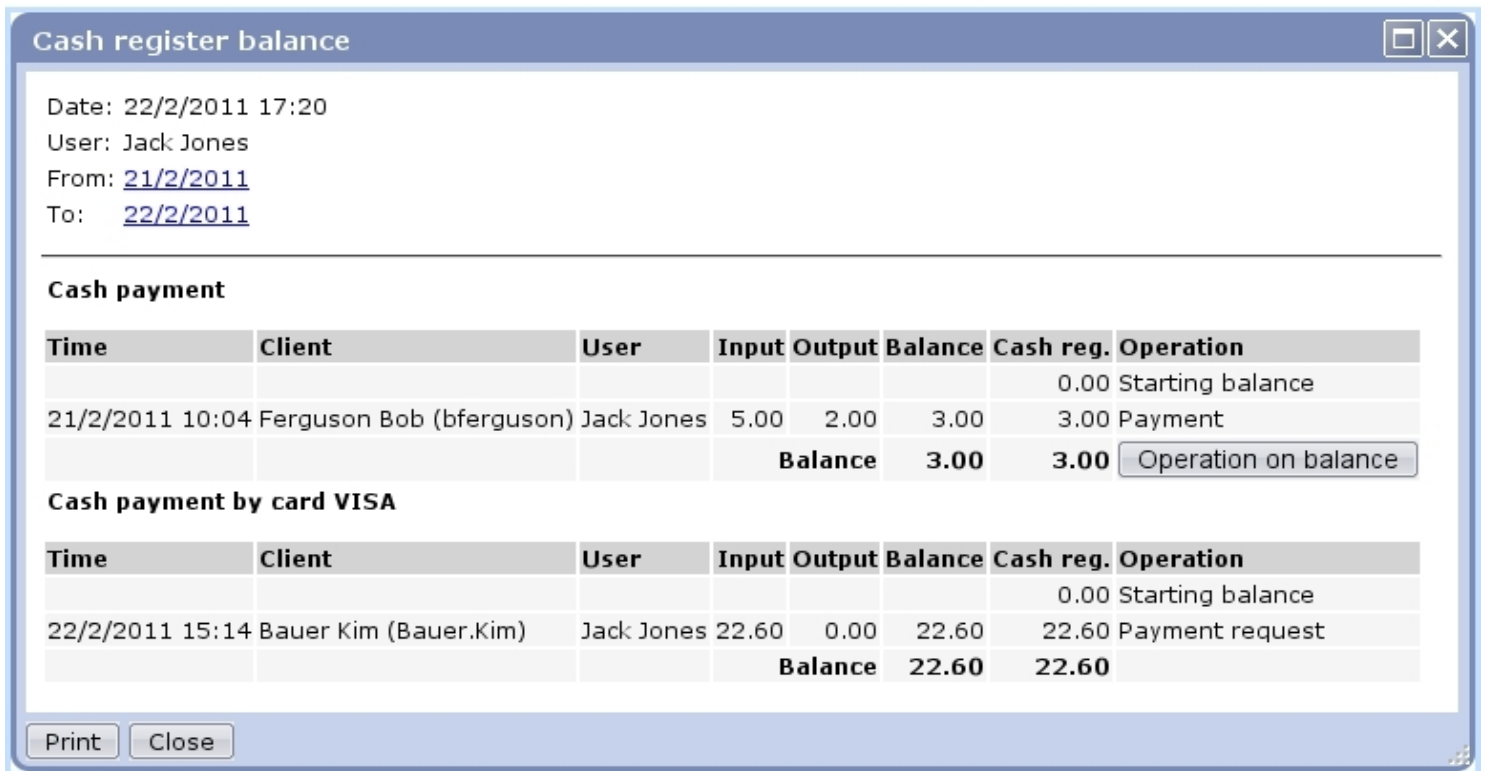



Figure 5.20: Checking the balance of a cash register as it is after the payments registered via cash (5.6.3.1) and via credit card (5.6.3.2).

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 (B.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]

Operation on cash register balance

Current amount in cash register: **3.00**

Operation:

Registered amount:

→

Cash register balance

...

Cash payment

Time	User	Input	Output	Balance	Type
				0.00	Starting balance
10/6/2009 11:10	admin	5.00	2.00	3.00	Payment
10/6/2009 15:32	admin	50.00	0.00	53.00	Added to cash float
				Balance	53.00

...

Figure 5.21: Putting change inside a cash register.

/

View payments/credit notes

Search payments/credit notes for:

Day-Month-Year: - -

Reference:

Client name pattern: Account:

Client billing status:

1 payments/credit notes found

Payment #2011020201C000145	2/2/2011	100.00	Barnes Cletus	Barnes.Cletus	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
--	----------	--------	-------------------------------	---------------	---------------------------------------	---------------------------------------

Total payments: 100.00

Total balance: 100.00

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).

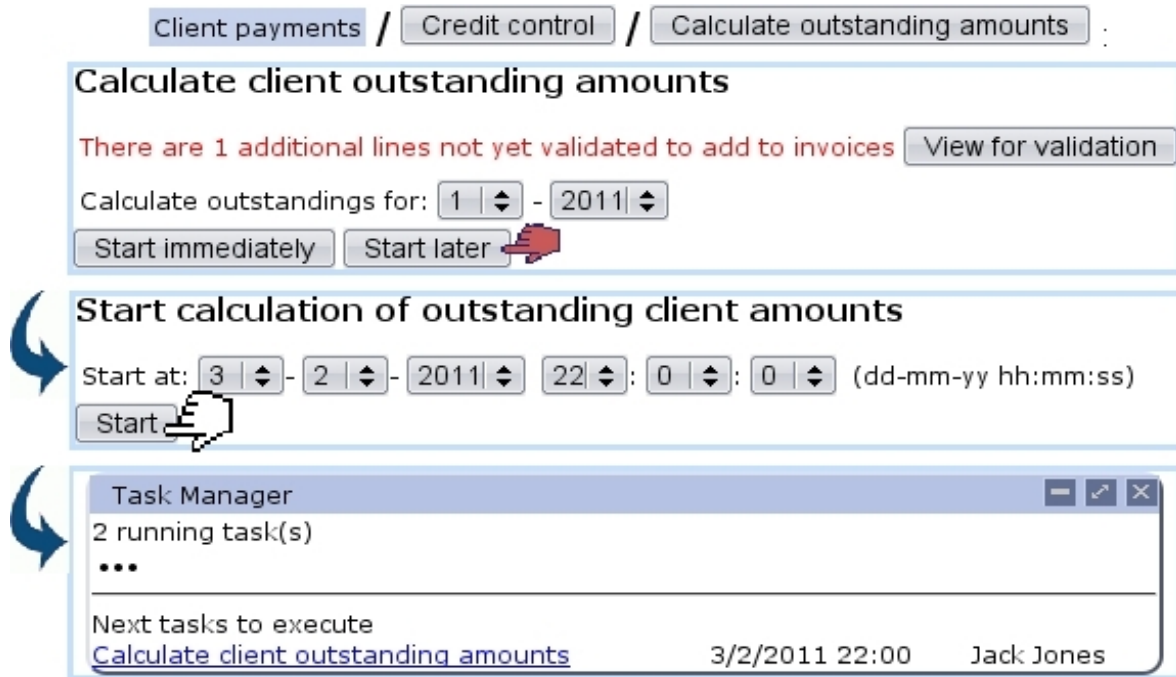


Figure 5.24: Scheduling the calculation of outstanding amounts.

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 (B.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
Mayfield Herbert, Jr	Mayfield.HerbertJr	Ok	10/6/2009	722.51	926.60	204.09	0.00
Total				722.51	926.60	204.09	0.00

View client account for Mayfield Herbert, Jr

Date	Reference	Debit	Credit	Balance	
10/6/2009	Invoice #2009061001005	1.17	2.00	0.83	
10/6/2009	Invoice #2009061001003	26.37	22.60	-3.77	
...	...				
23/4/2009	Credit note #2009042301C000111	0.00	150.00	150.00	Modify Remove
13/11/2008	Payment #2008111301C000043	0.00	174.00	174.00	Modify Remove
Total		722.51	926.60	204.09	

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
Barnes Cletus	Barnes.Cletus	Ok	842.79	655.75	-187.04	250.00	
Bauer Kim	Bauer.Kim	First reminder	803.20	804.60	1.40	250.00	
Total			1645.99	1460.35	-185.64		-314.36

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
Barnes Cletus	Barnes.Cletus	Ok	250.00	-1.17	0.00	0.00	0.00	0.00	-1.17
Bauer Kim	Bauer.Kim	First reminder	250.00	-59.23	0.00	0.00	0.00	0.00	-59.23
				-60.40	0.00	0.00	0.00	0.00	-60.40

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

Reference: 2011020201001	Username : Seranescu.Pompilius
Value date: 2/2/2011	Name : Seranescu Pompilius
Period date: 2/2/2011	Address : 26 Lame Street
Status: open	90210 BH
Order number: 2011020201001	USA
Export: not exported	Billing : First reminder
Registered by: 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
Total VAT incl. 11.80				0.00	11.80

Value date: 4/2/2011 1 2

Register

New credit note [2011020201001/1](#) was successfully registered.

[Invoice Search Page] :

2/2/2011	#2011020201001/1 Credit note paid Seranescu Pompilius	... -11.80	Modify
2/2/2011	#2011020201001 Invoice paid Seranescu Pompilius	... 11.80	Modify

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

Reference:	2011021401001	Username :	Salazar.Ramon
Value date:	14/2/2011	Title :	Mr
Period date:	14/2/2011	Name :	Salazar Ramon
Status:	sent	Address :	4, Taco Street 87100 Albuquerque USA
Order number:	2011021401001	Billing :	Contentious
Export:	not exported		
Registered by:	Jack Jones		

Article	Quantity	Price	Total price
Low-Salt Crackers Box	22	2.00	44.00
Standard mail	1	8.00	8.00
Total VAT incl.			54.94
Total VAT excl.			52.00
Total VAT 6.00%			2.94

 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	#2011021401001/1	Credit note canceled	Salazar Ramon	Salazar.Ramon	-54.94	<input type="button" value="Modify"/>
14/2/2011	#2011021401001	Invoice canceled	Salazar Ramon	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
Ferguson Bob	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
				126.00	32.00	-94.00
Total				126.00	32.00	-94.00

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>				
2011012501001	25/1/2011	29.00	0.00	-29.00
2011012001001	20/1/2011	29.00	0.00	-29.00
2011011401001	14/1/2011	68.00	0.00	-68.00
Total		126.00	0.00	-126.00

...

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 / View account / [Client Search] [balance amount](#)
- or through Client payments / Reconcile payment/credit note / [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 #2011011401001	0.00	60.00	60.00	Remove reconciliation
Standard mail	Payment on invoice #2011011401001	0.00	8.00	8.00	Remove reconciliation
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
Ferguson Bob	bferguson	Ok	all orders	58.00	64.00	6.00

View client account for Ferguson Bob

Date	Reference	Debit	Credit	Balance	
25/1/2011	Invoice #2011012501001	29.00	0.00	-29.00	
20/1/2011	Invoice #2011012001001	29.00	0.00	-29.00	
14/1/2011	Invoice #2011011401001	68.00	68.00	0.00	
3/2/2011	Payment #2011020301C000146	0.00	32.00	32.00	<input type="button" value="Modify"/> <input type="button" value="Remove"/>
			
Total		126.00	100.00	-26.00	<input type="button" value="Register online payment"/>

View client account for Ferguson Bob

Date	Reference	Debit	Credit	Balance	Export
25/1/2011	Invoice #2011012501001	29.00	0.00	-29.00	not exported ...
Total		29.00	0.00	-29.00	

...

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	
2011020301C000146	Payment	3/2/2011	32.00	<i>Panel A</i>

Reference:	2011012501001	Username :	bferguson	<i>Panel C</i>
Value date:	25/1/2011	Title :	Mr	
Period date:	25/1/2011	Name :	Ferguson Bob	
Status:	open	Address :	23 Namaste Street	
Order number:	2009042201010		96800 Honolulu	
Export:	not exported		USA	
Registered by:	Jack Jones			

Article	Quantity	Price	Total price	Settled	Register
Cracker Box	29	1.00	29.00	0.00	
Total VAT incl.			29.00	0.00	0.00

Panel A

<i>Panel B</i>	Reference: 2011020301C000146	Username : bferguson	<i>Panel C</i>
	

Description	Reference	Debit	Credit	Balance
Gizmo	Payment on invoice# 2011011401001	0.00	60.00	60.00
Standard mail	Payment on invoice# 2011011401001	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"/>
Total VAT incl.			29.00	0.00		<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	Payment #2011020301C000146	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	Invoice #2011011401001	68.00	0.00	-68.00	not exported	<input type="button" value="Remove reconciliation"/>
25/1/2011	Invoice #2011012501001	29.00	0.00	-29.00	not exported	<input type="button" value="Remove reconciliation"/>
Total		97.00	100.00	3.00		

Figure 5.37: How this payment was used.



[Invoice Search Page] :

#2011012501001	Invoice	open	Ferguson Bob	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"/> Bauer Kim	<input checked="" type="checkbox"/> #2010120401002	04/12/2010	58.00	40.00	-18.00
			58.00	40.00	-18.00
<input checked="" type="checkbox"/> Scofield Michael	<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
			180.00	0.00	-180.00
<input checked="" type="checkbox"/> Seranescu Pompilius	<input checked="" type="checkbox"/> #2010120701001	07/12/2010	1.00	0.00	-1.00
...			-1.00	0.00	-1.00

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	
Username:	Scofield.Michael
Name:	Scofield
First name:	Michael
...	
Billing:	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

4/5/2009	Reminder for invoices Sheldon Helen	Sheldon.Helen	2.46 sent
4/5/2009	Reminder for invoices Seranescu Pompilius	Seranescu.Pompilius	71.46 sent
...			

Figure 5.42: Displaying the reminders issued on May, 2009.

[4/5/2009](#) Reminder for invoices [Sheldon Helen](#)

Posting date :	4/5/2009
Value date :	4/5/2009
Client :	Sheldon Helen (Sheldon.Helen)
Reminder :	Reminder for invoices
Status :	sent
Registered by :	admin
#2009050401000148	reminded 1.23
#2009031901000103	reminded 1.23
Total: 2.46	

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	2011020901002	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* (B.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:

Account: [Add new account](#)

Add client bank account

Account:

[Add](#)

Add domiciliation order for client Marshall Justin

Order:

Account: [Add new account](#)

Client number:

Max. amount per line:

Status:

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	
all orders	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	2011020701001	Marshall Justin	jstn.mrsh73	Invoiced	2011020701001 (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: registered |

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"/>	Marshall Justin	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 (B.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: ▼

1012	Default Article Account	Default article	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
30001	Food articles	Specific article	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
40001	Client account	Specific client	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
44000	Default VAT Account	Default VAT	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
44572	Am-VAT 5%	Specific VAT	<input type="button" value="Modify"/>	<input type="button" value="Remove"/>
44573	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

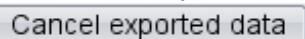
Figure 6.4: Exporting to the External System.

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.

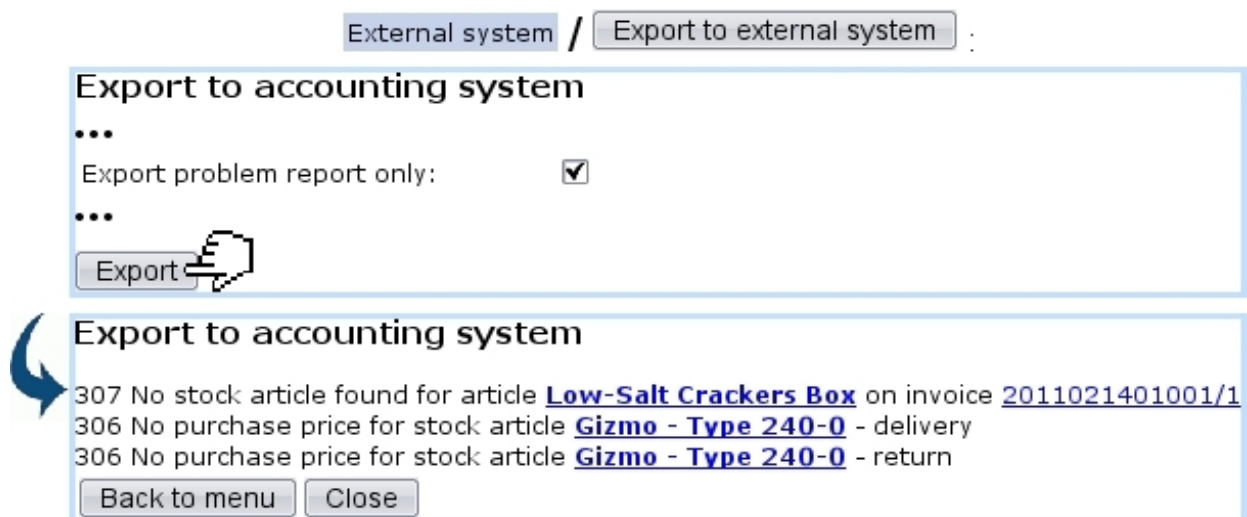


Figure 6.5: This report shows what would not be successfully exported and why.

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 :

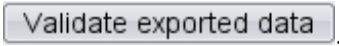
- stock entries (3.6.3) ;
- stock deliveries (3.6.4) ;
- stock exits (3.6.5.8) ;
- stock returns (3.6.5.9).

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.

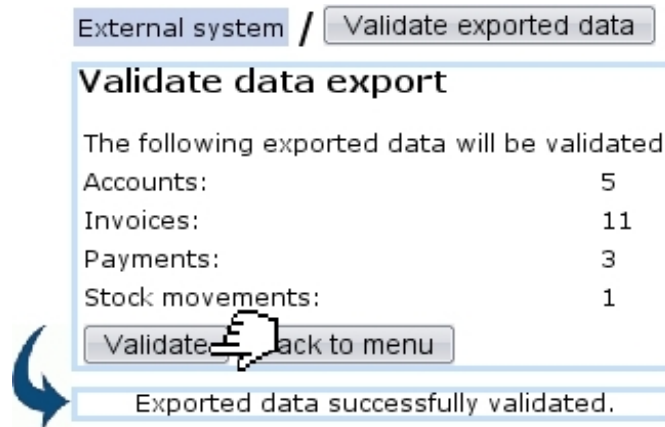


Figure 6.7: Validating previously exported data.

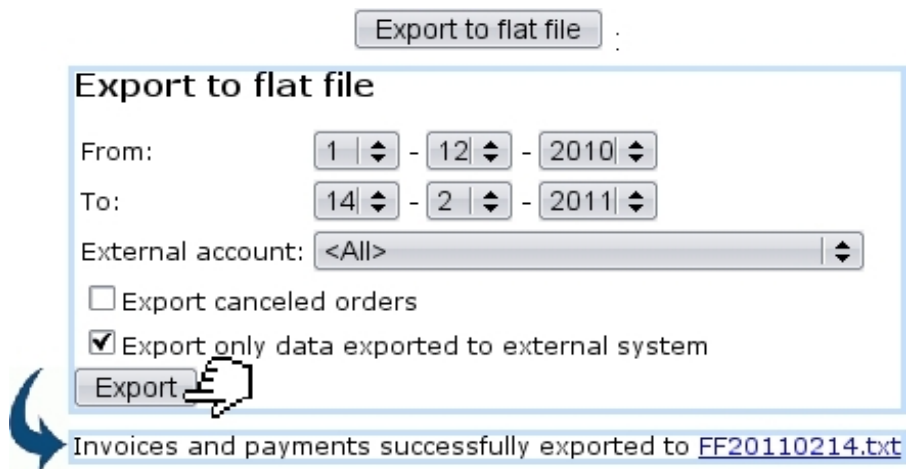


Figure 6.8: Exporting accounting data to a flat file.

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* (B.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 (B.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.

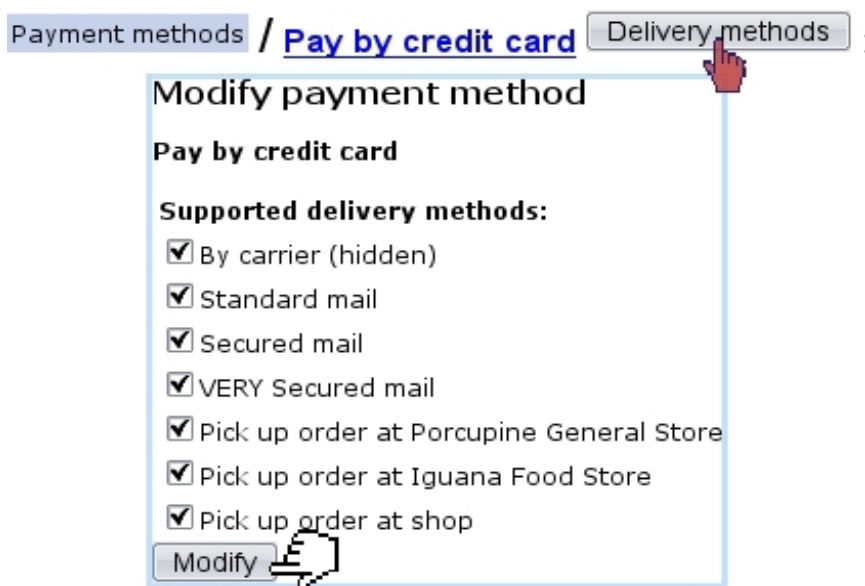


Figure 6.17: This payment method will support all pick-up-order delivery methods.

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.

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

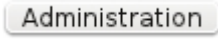

In order to broadcast miscellaneous company-related news to users, Blue Chameleon has designed a news tool that, upon login, permits user to be noticed of anything happening, as well as, should it be needed, publishing her/his own news to inform the user community about particular events that may happen.



News access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (B.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

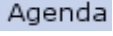
As illustrated by Fig.7.4, if the news Event Control has been setup (1.3) by the user, freshly published news will be displayed when logging in on Blue Chameleon, or when clicking on ; either way, unread news can be displayed by clicking on .



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 (B.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

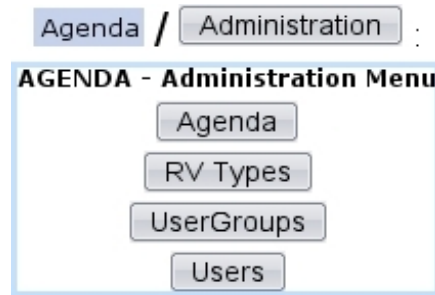


Figure 7.5: The *Agenda Administration Page*, with buttons designed to configure agenda display and rights.

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.

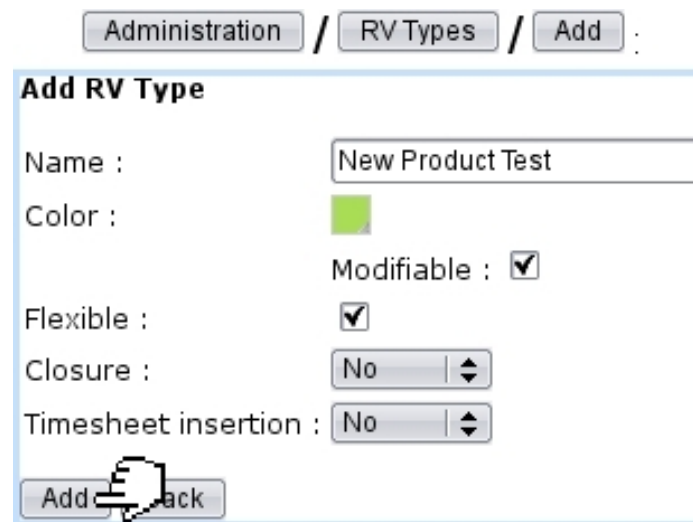


Figure 7.6: Creating a RV type called 'New Product Test'.

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

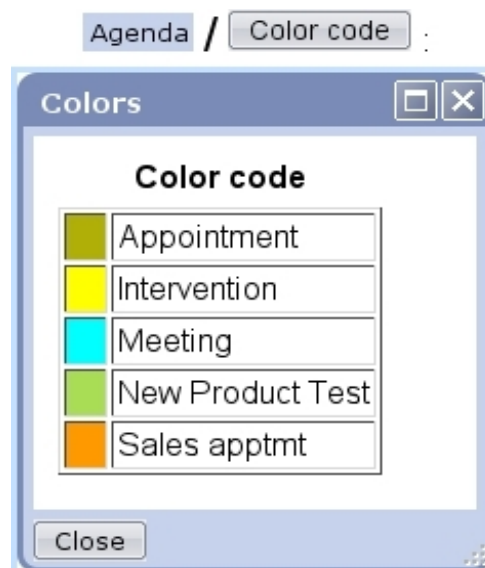
When a RV type is added as described above or when an appointment is edited (7.2.3.2), the color under which related appointment appears can be defined/updated in way shown at Fig.7.7.



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 **Color code** 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>', and 'User group : Sales Department'. There are 'Add' and 'Back' buttons at the bottom of the form. Below the form is a table titled 'List of agendas' with two rows: 'Admin' and 'Sales Dept. Agenda'. Each row has four buttons: 'Modify', 'Style', 'RV Types', and 'Groups'. An 'Add' button is located at the bottom left of the table. A blue arrow points from the 'Add' button in the table to the 'Add' button in the form above.

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 ;

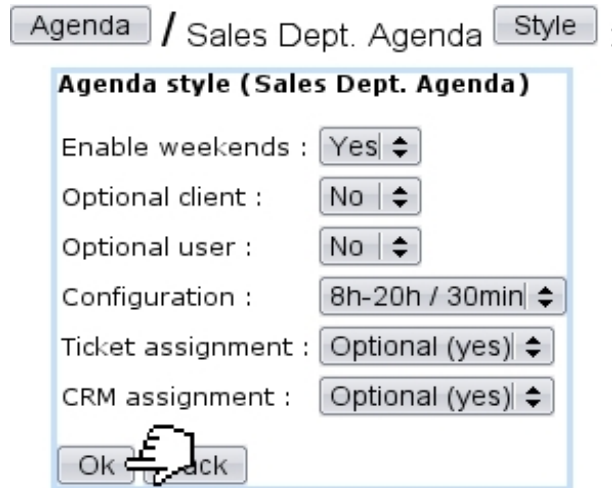


Figure 7.9: Defining the 'Sales Department' agenda style.

- 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*.

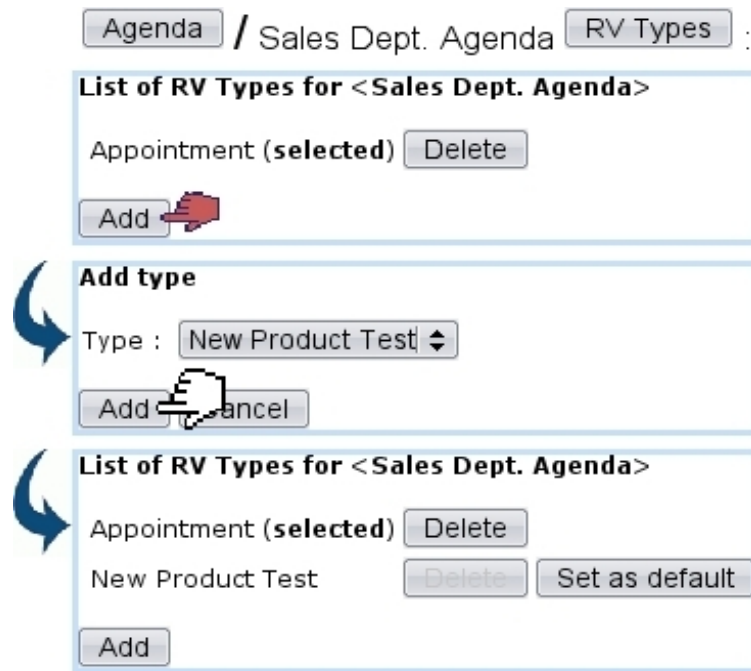


Figure 7.10: Adding the RV type 'New Product Testing' to the 'Sales Dept.' agenda.

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*.

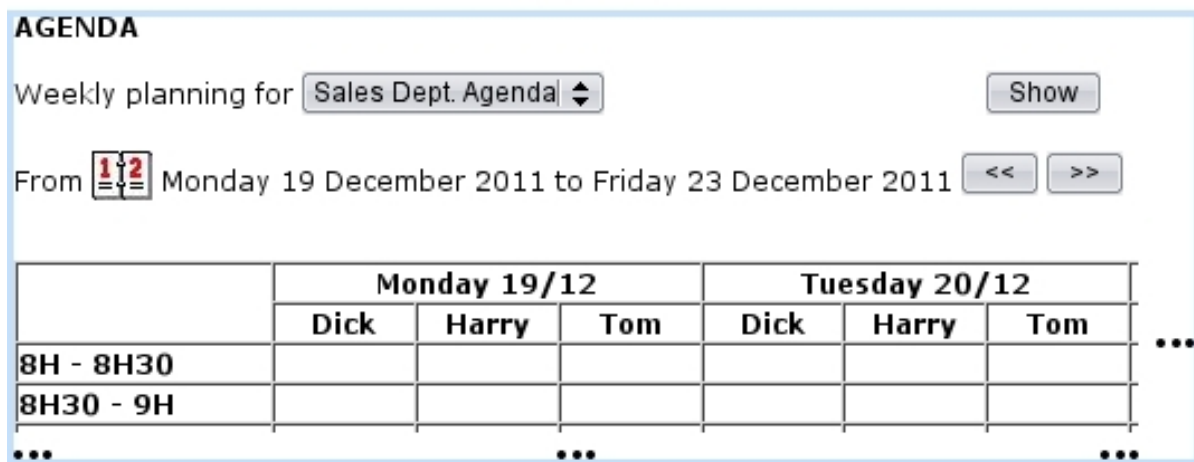
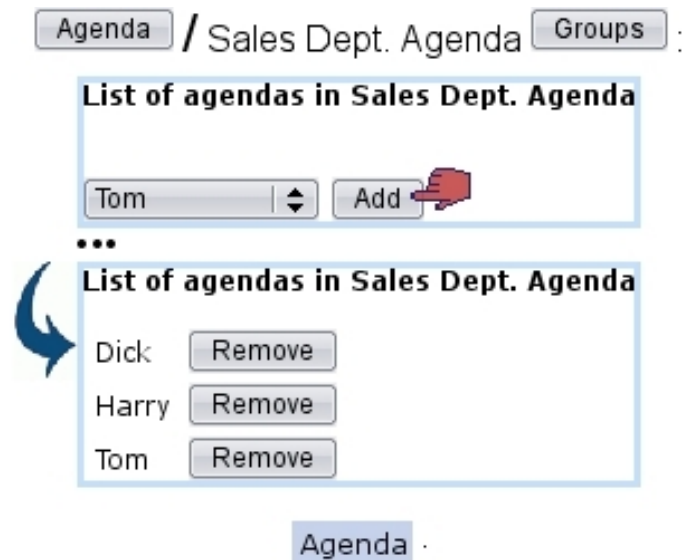


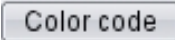
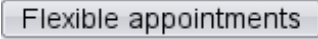
Figure 7.11: The own **agendas** of Tom, Dick and Harry are added into user-group-oriented 'Sales Dept. Agenda'; as a result, these three agendas are all featured when displaying the 'Sales Dept. Agenda'.

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) ;

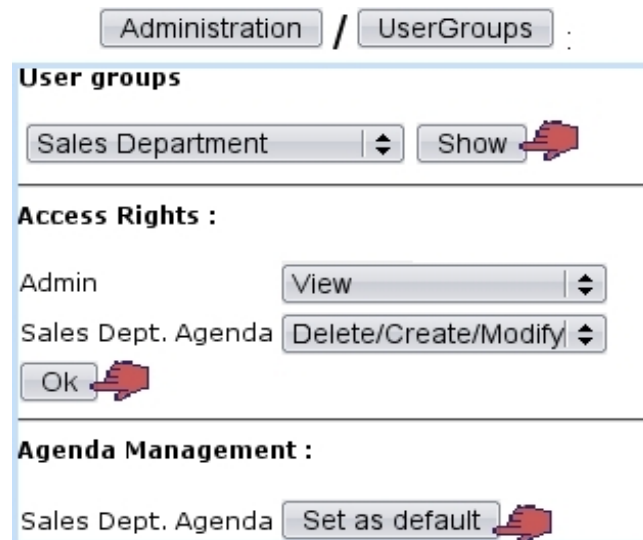


Figure 7.12: Setting the rights of a user group to agendas.



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

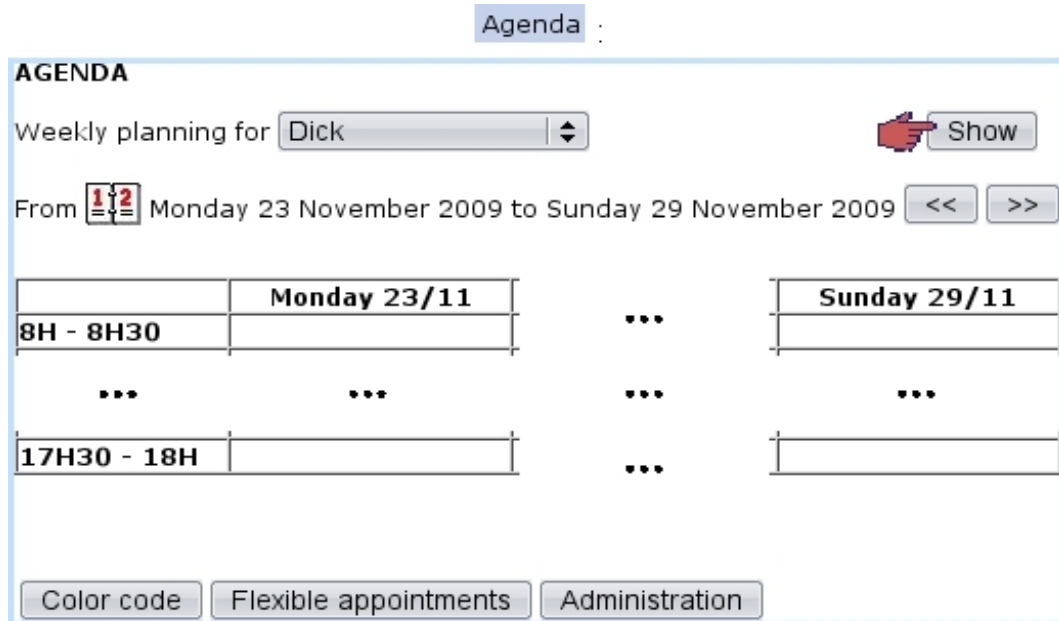


Figure 7.14: The *Main Agenda Page*.

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.

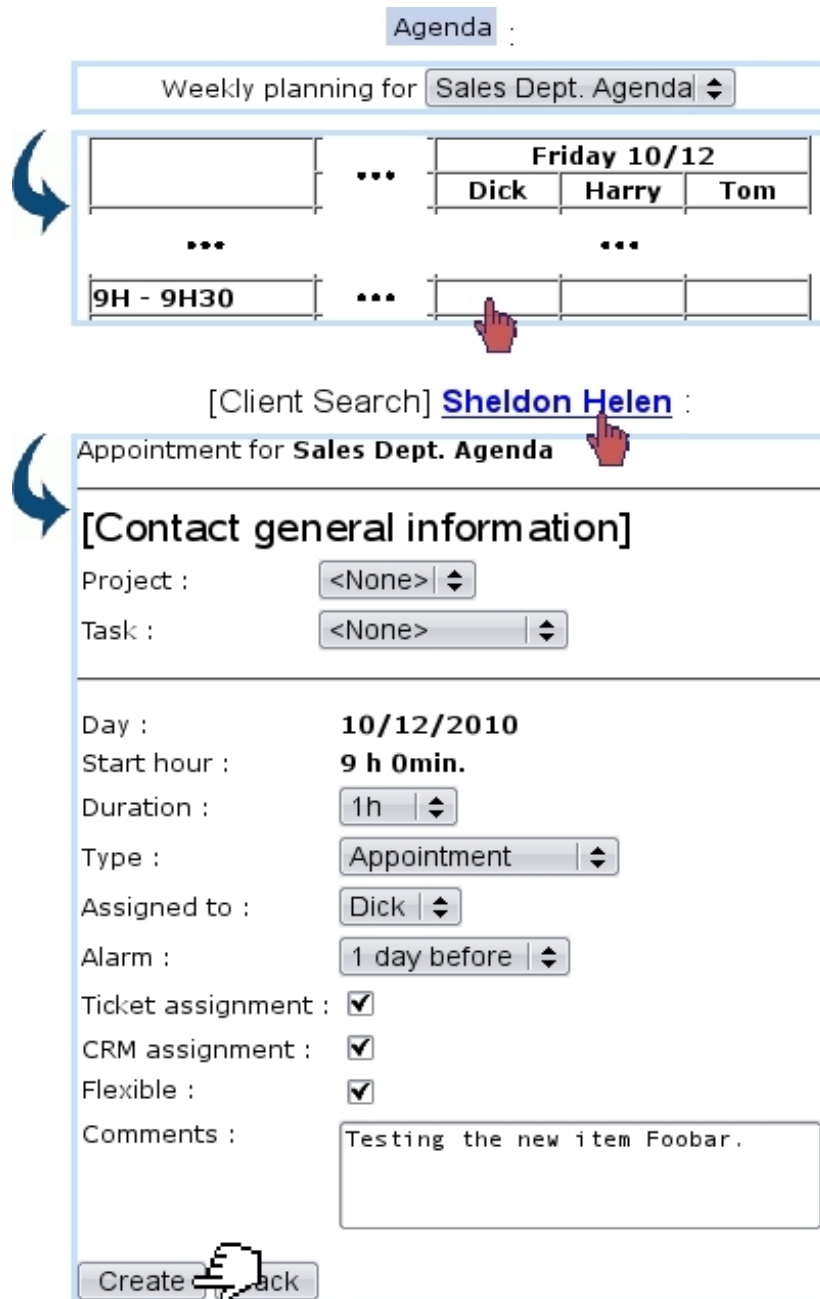


Figure 7.15: Adding an appointment for a client.

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-

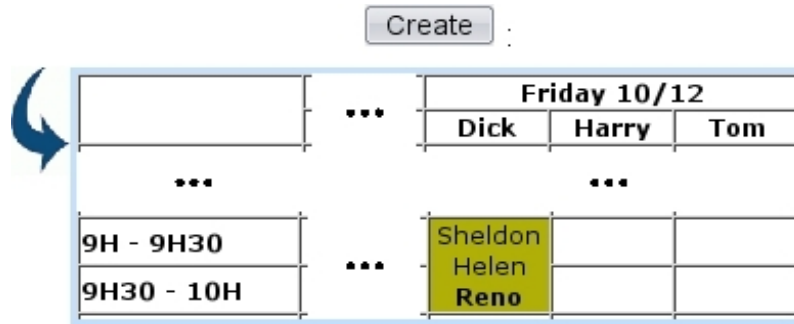


Figure 7.16: The now-scheduled appointment.

[On an Agenda which style is 'Client: optional'] :

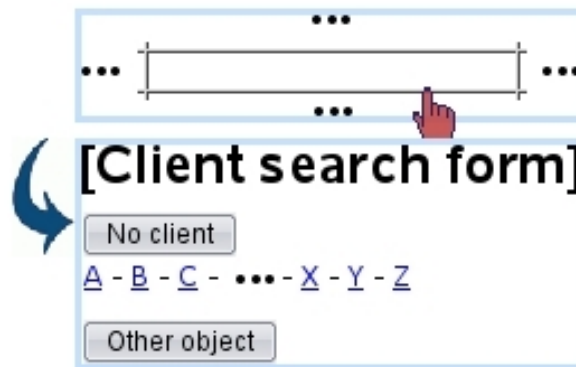


Figure 7.17: While the 'Other object' button is always available whatever agenda style is, the 'No client' one is only there if agenda style has optional client.

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.

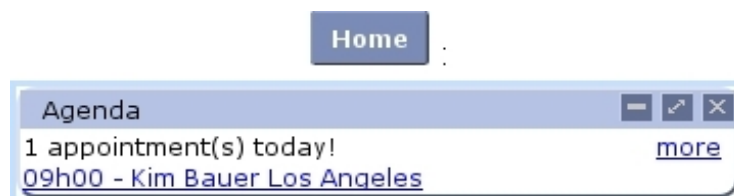


Figure 7.19: This appointment is imminent ; clicking on the [more](#) link will lead to the *Main Agenda Page* for the current week, while clicking on the link below "1 appointment(s) today !" will lead to the page for that very appointment.

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 (B.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 :

Due date : 

Figure 7.20: Setting a new alarm.

It then appears in a table, along with a link that allows to modify it :

Alarms :

Alarms

Date	Object	Comment	
27/7/2011 08:00	Alarm	Buy new toners !	Modify

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 (B.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.

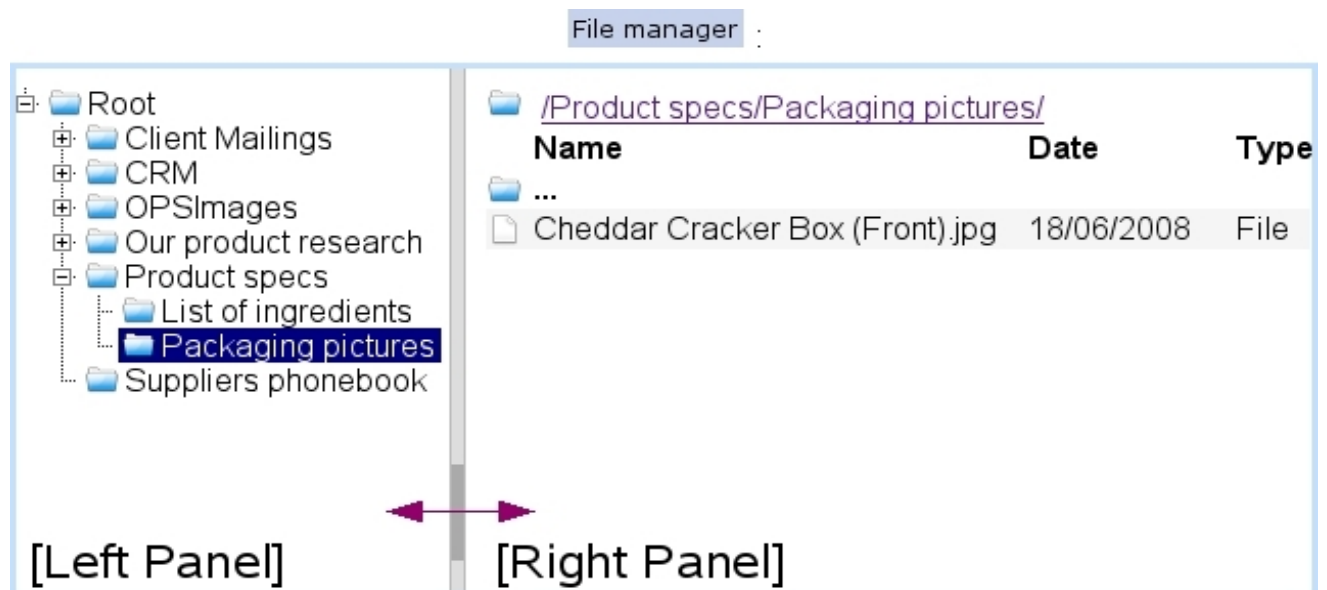





Figure 7.23: The *File Manager Page*.

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.

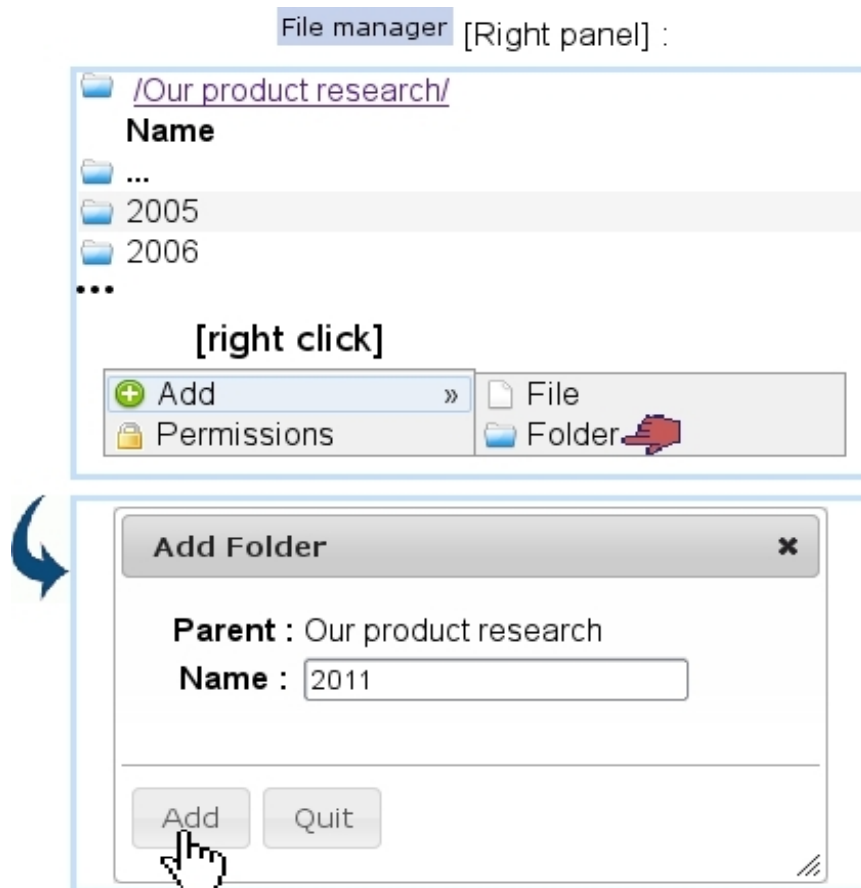
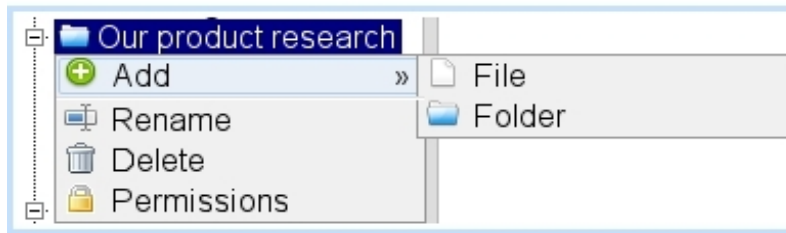


Figure 7.24: Creating the new folder '2011' at the 'Our product research' directory.

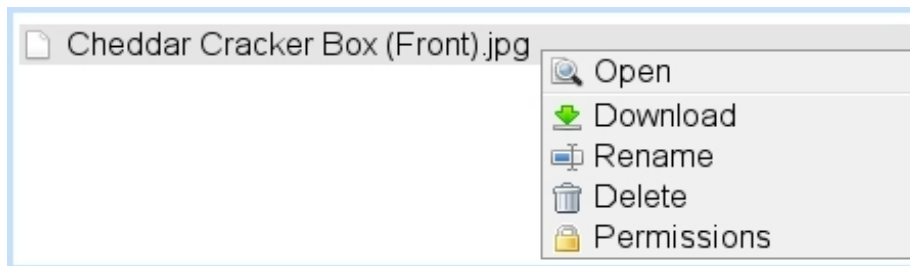
This folder could also be have been created from the left panel by a single click to highlight folder 'Our product research' and by then a right click :

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.

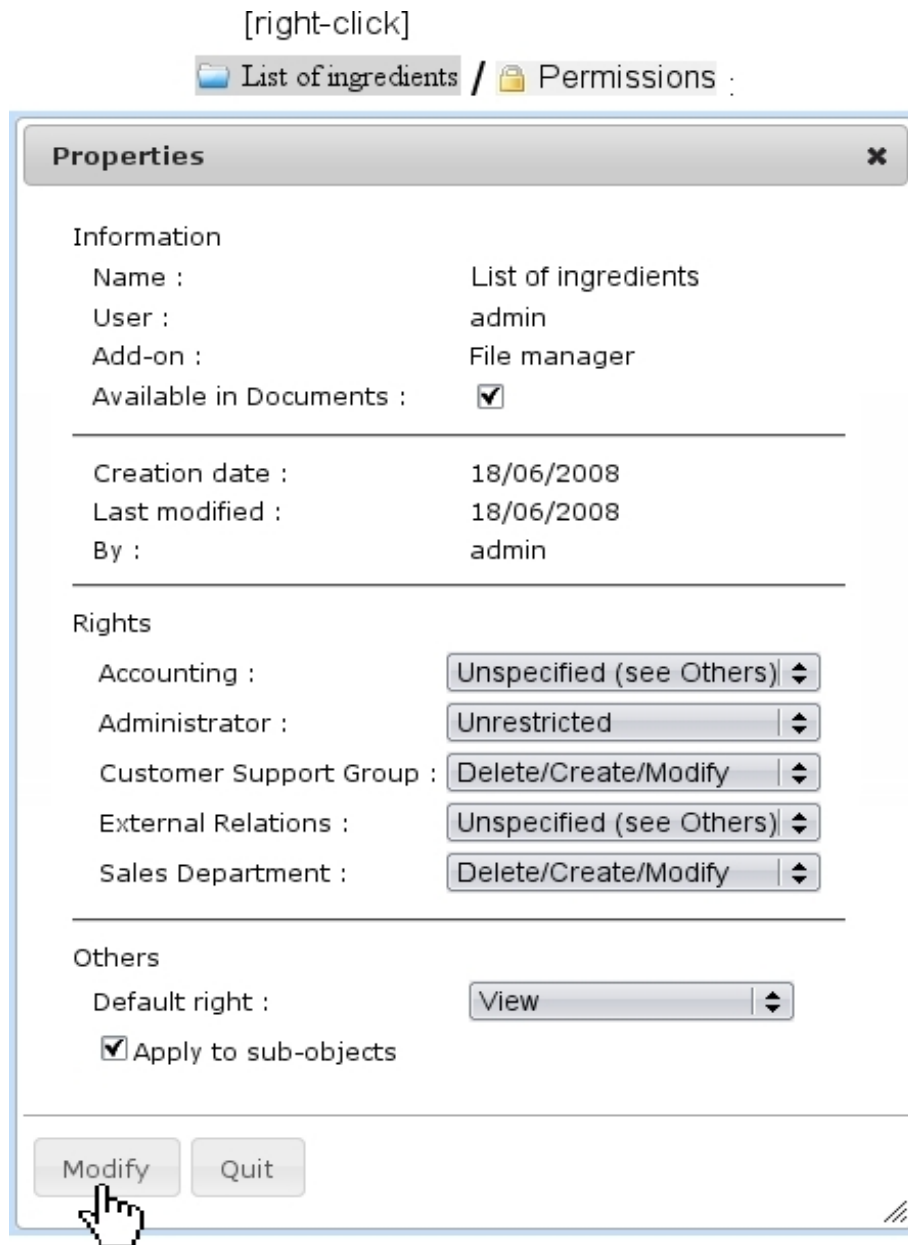


Figure 7.25: Setting the rights for the folder 'List of ingredients'.

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'.

Task List / **Open list** :

Task list, Open list

Model	Start date	End date
<input checked="" type="checkbox"/> Water fountains	12/09/2011	16/09/2011

Task list

Task list : Status : View : User :

Date : from 1/9/2011 to 14/9/2011

Model	Start date	End date	Task	Exec date	Posting date	User
Water fountains	12/09/2011	16/09/2011	Gen. cleaning	None	None	To be done by Jack Jones <input type="button" value="Update"/>
Water fountains	12/09/2011	16/09/2011	Bottle mgmt	None	None	To be done by Jack Jones <input type="button" value="Update"/>

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
Water fountains	12/09/2011	16/09/2011	Open	0/2 <input type="button" value="View"/> <input type="button" value="Modify"/> <input type="button" value="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 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
Water fountains	12/09/2011	16/09/2011	Open	0/2 <input type="button" value="View"/> <input type="button" value="Modify"/> <input type="button" value="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

Model	Start date	End date	Status	Tasks
Water fountains	12/09/2011	16/09/2011	Closed	2/2 <input type="button" value="View"/> <input type="button" value="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	
Water fountains ...	Gen. cleaning	16/09/2011	16/09/2011	Jack Jones	Update

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
Water fountains	12/09/2011	16/09/2011	Closed	2/2 View Modify

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 of the dialog, 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> ▾

Object type: ossbo - Clients ▾ Status: <All> ▾

Property	Type	Object type	Data type	Default value	System		
ID registered	User	ossbo - Clients	Yes/No	No	<None>	<input type="button" value="View"/>	<input type="button" value="Modify"/>

A table sums up properties' types and object types as well as providing a 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 (B.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

Username:	Smith.John	Subscription status:	activated
Title:	Mr	Active subscriptions:	1
Name:	Smith	<div style="border: 1px solid black; padding: 5px;"><p>There is no property</p><p>More...</p></div>	
First name:	John		
Address:	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.

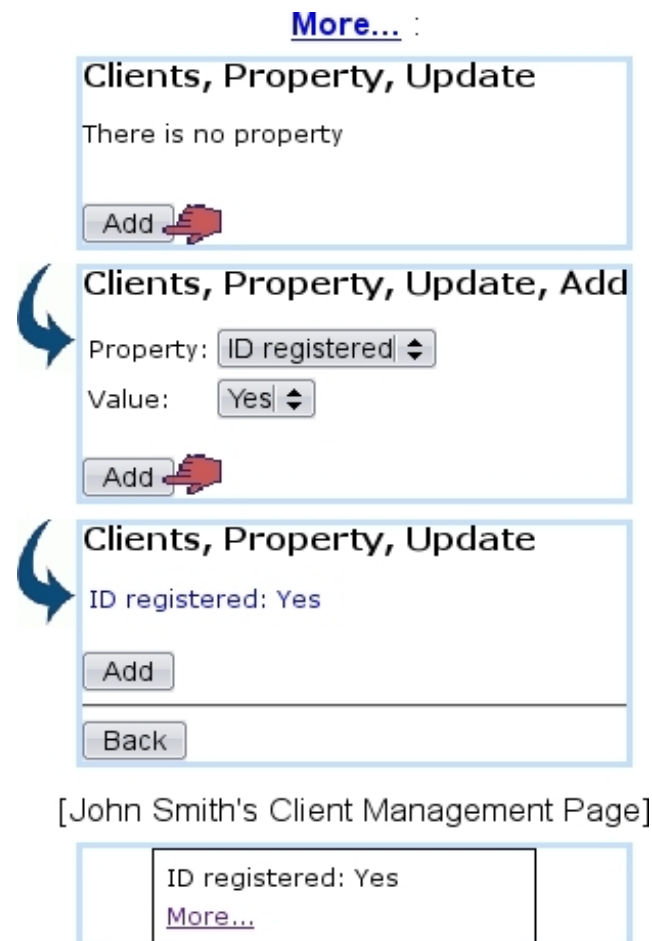


Figure 7.41: Setting the property 'ID registered' to 'Yes' for client John Smith.

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.

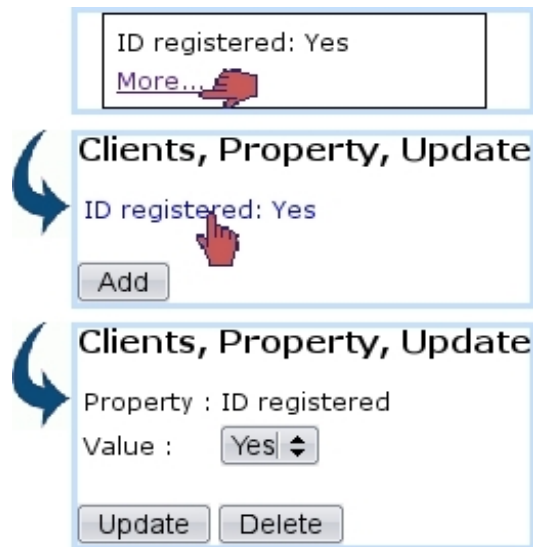


Figure 7.42: This allows a property to be changed or removed.

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*

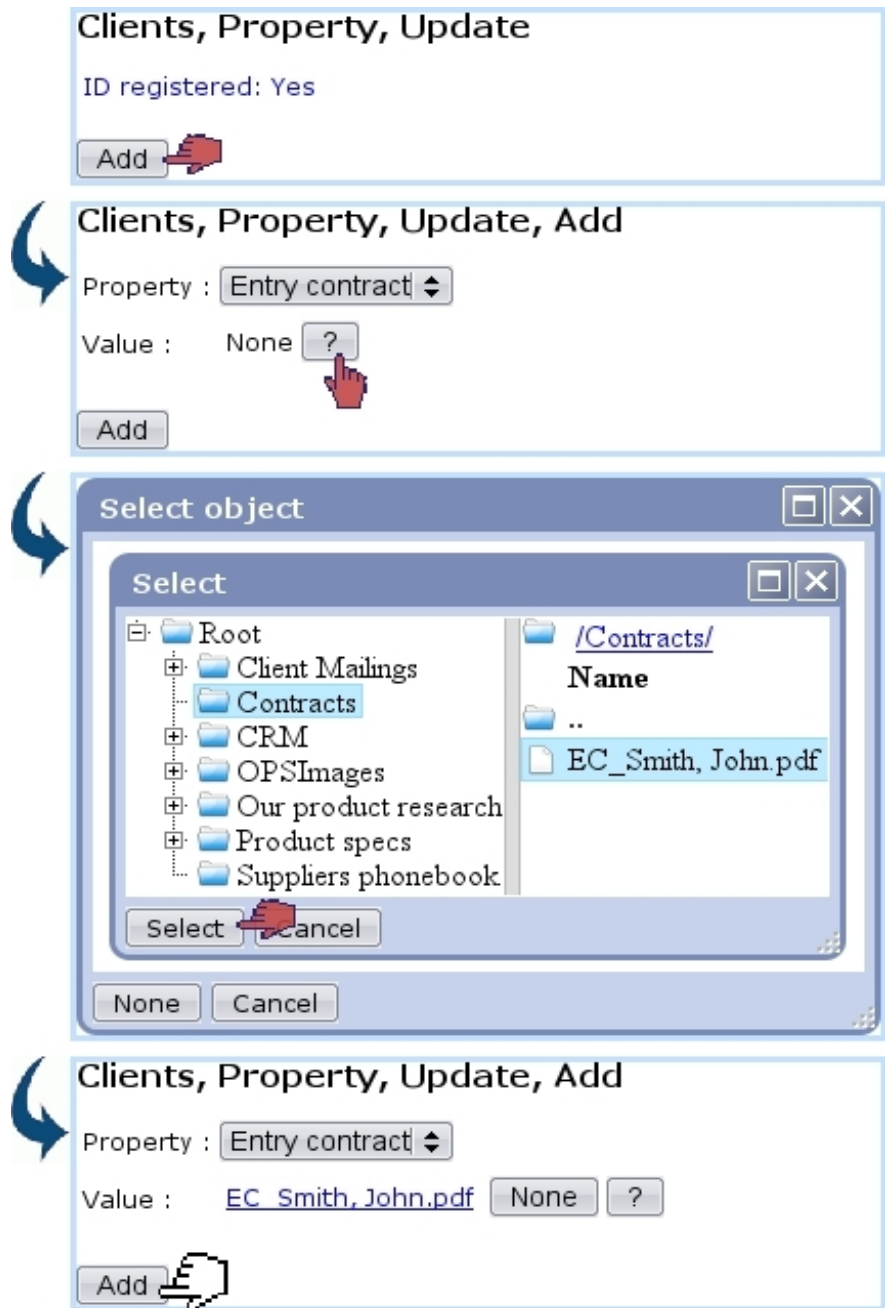


Figure 7.43: Adding an other property for a client.

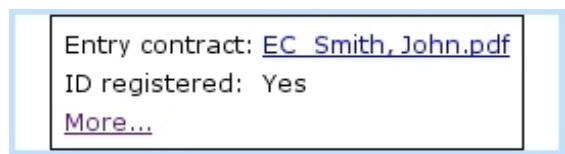



Figure 7.44: The two previously-set properties are now featured.

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 (B.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 (B.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	...
Tax Office	Tax Form, 2011	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.

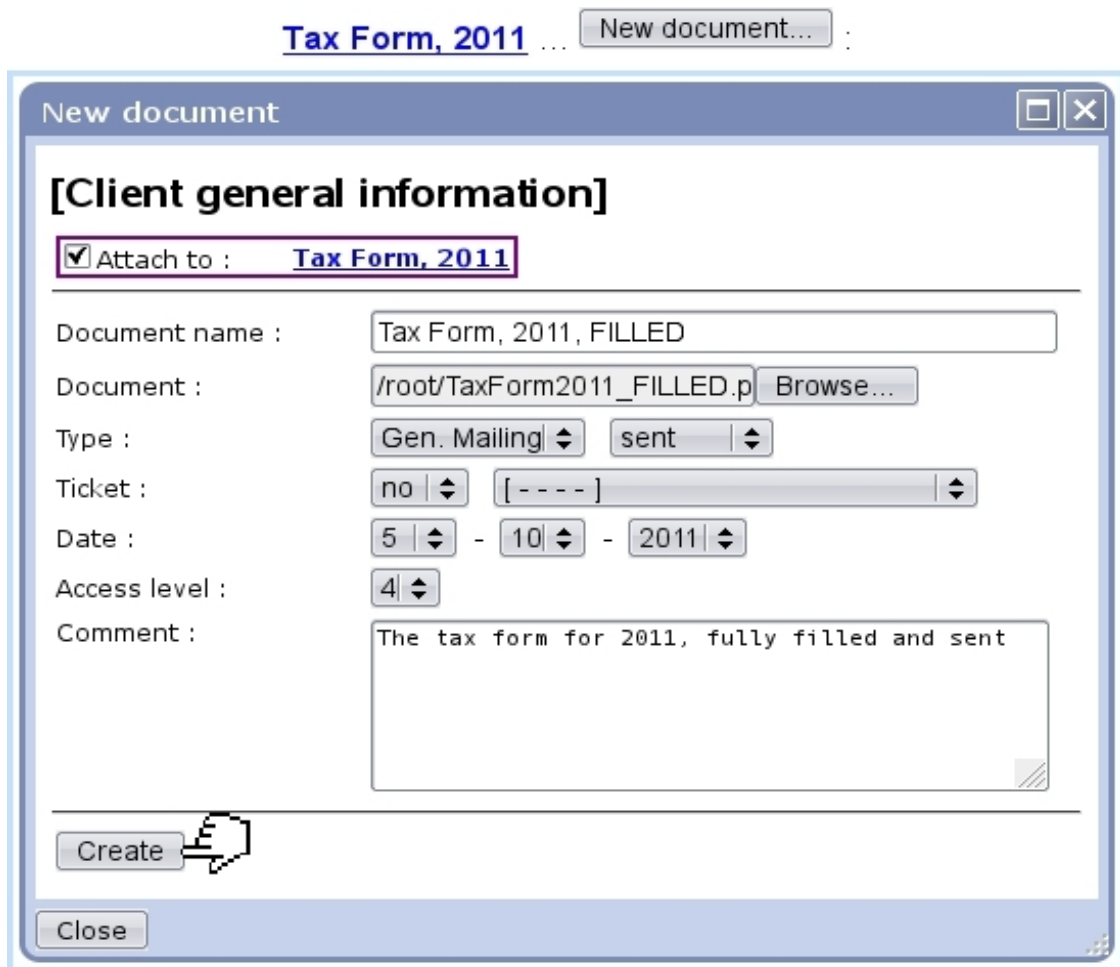


Figure 7.50: Attaching a reply to mail document 'Tax Form, 2011'.

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.

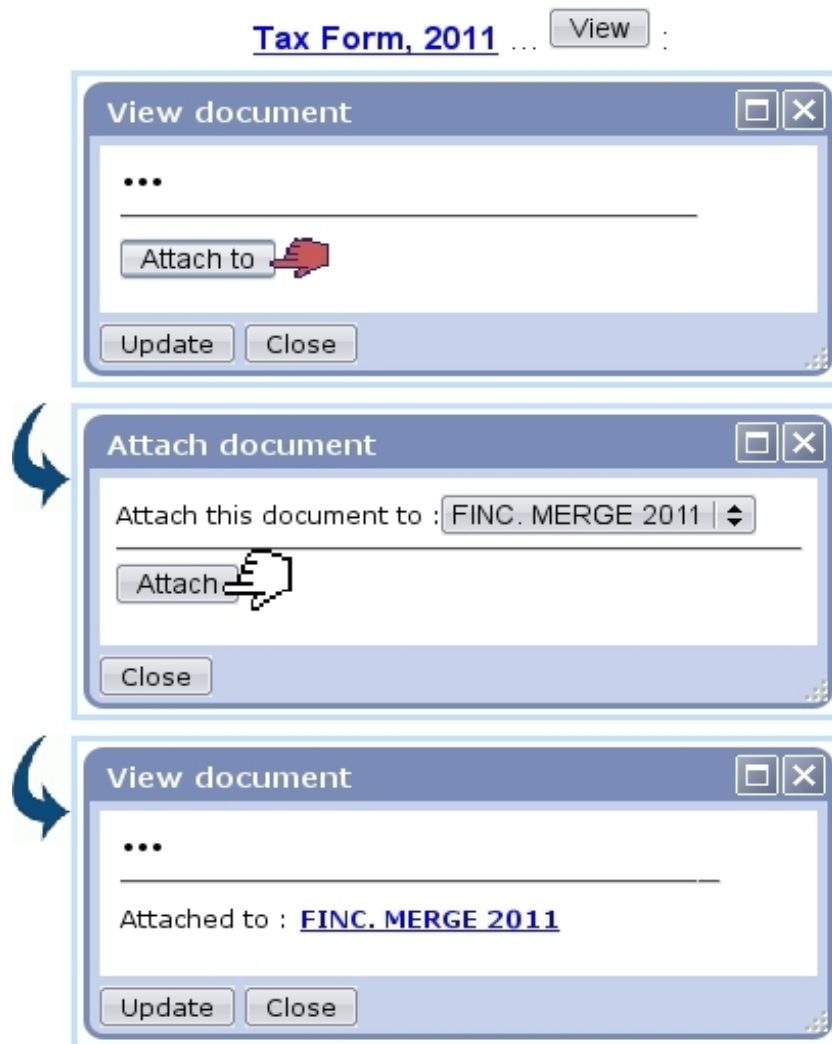


Figure 7.51: In this example, mail document 'Tax Form, 2011' is being attached to mail document 'FINC. MERGE 2011'.

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]

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 (B.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* (A).

1. creation of ticket types (A.2.1) and their related categories and parameters (A.2.2.1) ;
2. if to be used in the future, creation of predefined emails (A.2.2.2), texts (A.2.2.3) and durations (A.2.2.4) ;
3. creation of ticket styles (A.3) ;
4. editing user details for helpdesk (A.4) : style, rights and ticket types ;
5. editing user group details for helpdesk (A.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 (A.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 (B.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 (A.2) and a subsequent ticket parameter (A.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 (A.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).

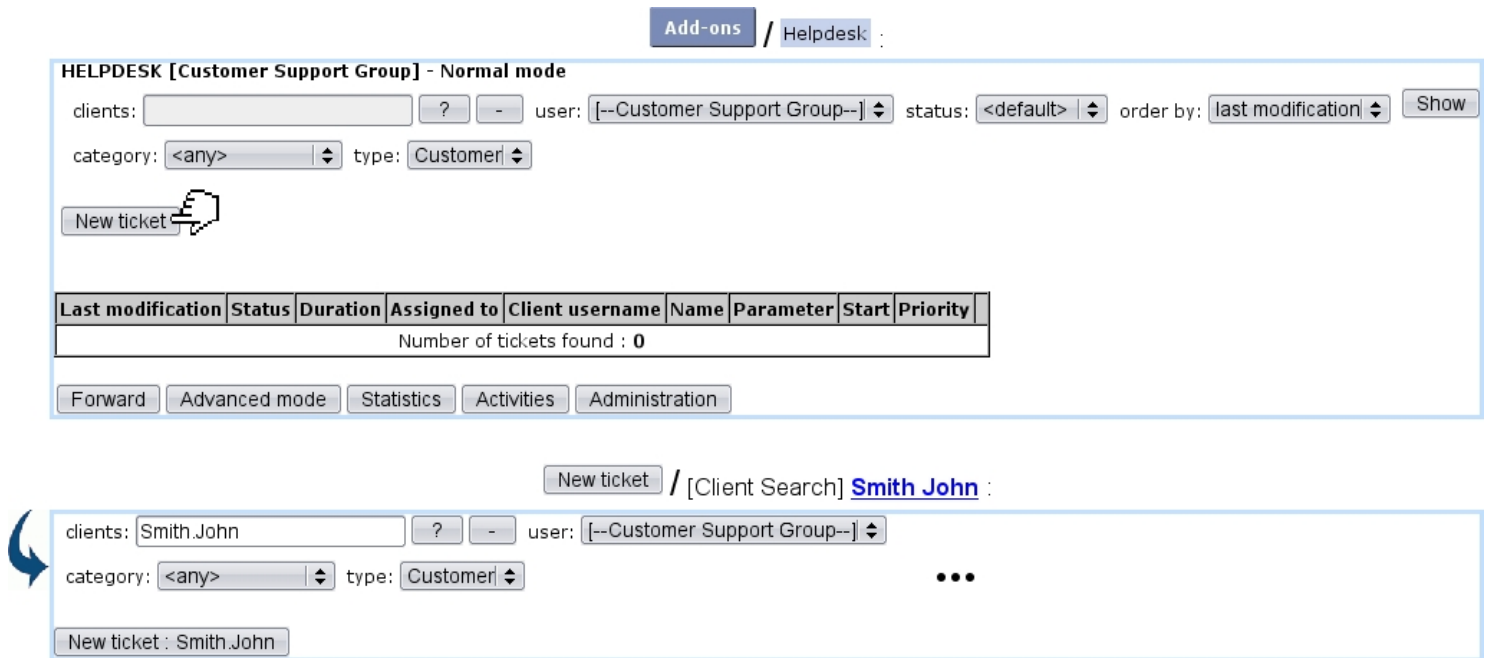


Figure 8.1: The main *Customer Support Page*, ready to create a ticket for client John Smith.

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

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 :

Complaint :

Email Notification

Email : Title :

Dear Sir/Madam,

Your request is currently being processed.

We thank you for your patience.

Kind Regards

SMS Notification

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 (A.2.1) can be optional and be chosen in a menu as predefined in the Helpdesk administration (A.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.**

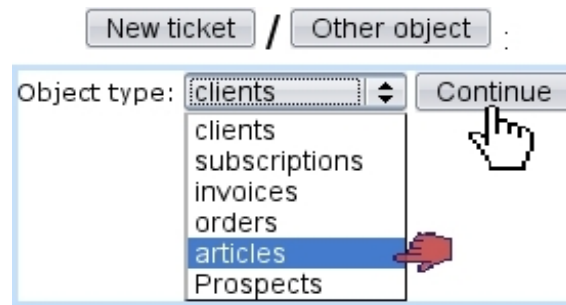


Figure 8.3: Creating a ticket for any object, pertaining to people (clients, prospects (7.9.3.1)), items (articles, subscriptions), invoices, orders...

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 (A.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 (A.4.1) and the available priorities to choose from then depend on user's commercial access levels (B.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).

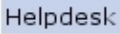
It is also possible to search into them after having chosen criteria for which you wish to see corresponding tickets. First, you have to be sure that the user's 'Menu View:' is

set to 'Client Search' (A.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	Smith John	Product	1/6/2010 9:40	Normal	View
Number of tickets found : 1									

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* (A.3).

Also, two tickets belonging to the same type can be made to appear differently (A.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 (A.2) and the parameter (A.2.2.1) you defined it to be.

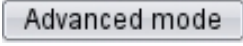
There are also properties that can be modify via drop-down menus :

- 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, A.2.1)
- the ticket's priority (if : ticket type allows to (A.2.1) and user is allowed to, A.4.1) ;
- the visibility of the ticket (if ticket type's visibility is set to 'private or public' or 'public or private, A.2.1).

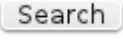
Any change is to be validated via the corresponding buttons, respectively , , ,  and .

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' (A.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 (A.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	
Create	Cancel

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).

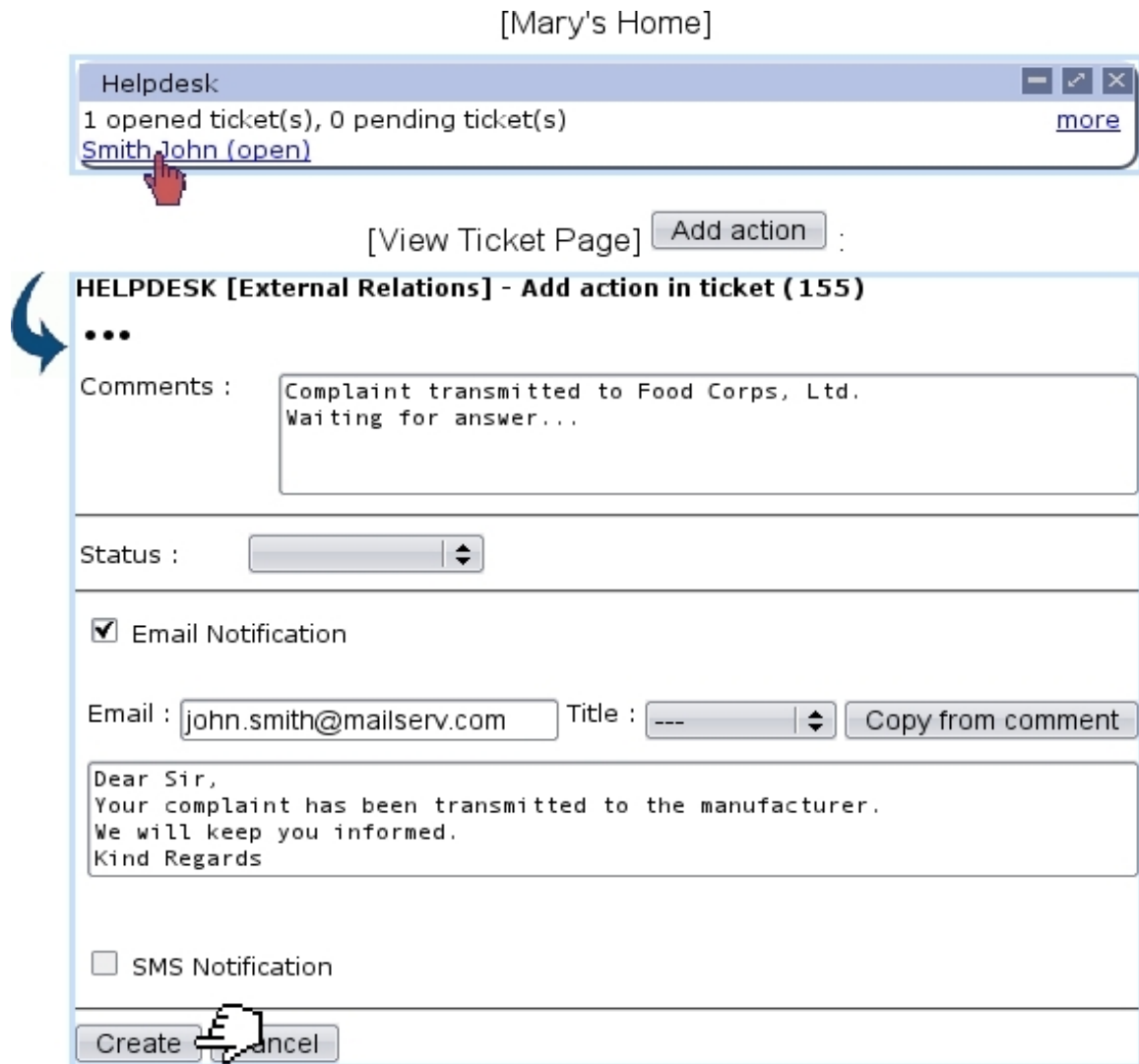


Figure 8.8: User Mary receives ticket and processes it according to her External Relations skills, and also informs client.



The 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 :

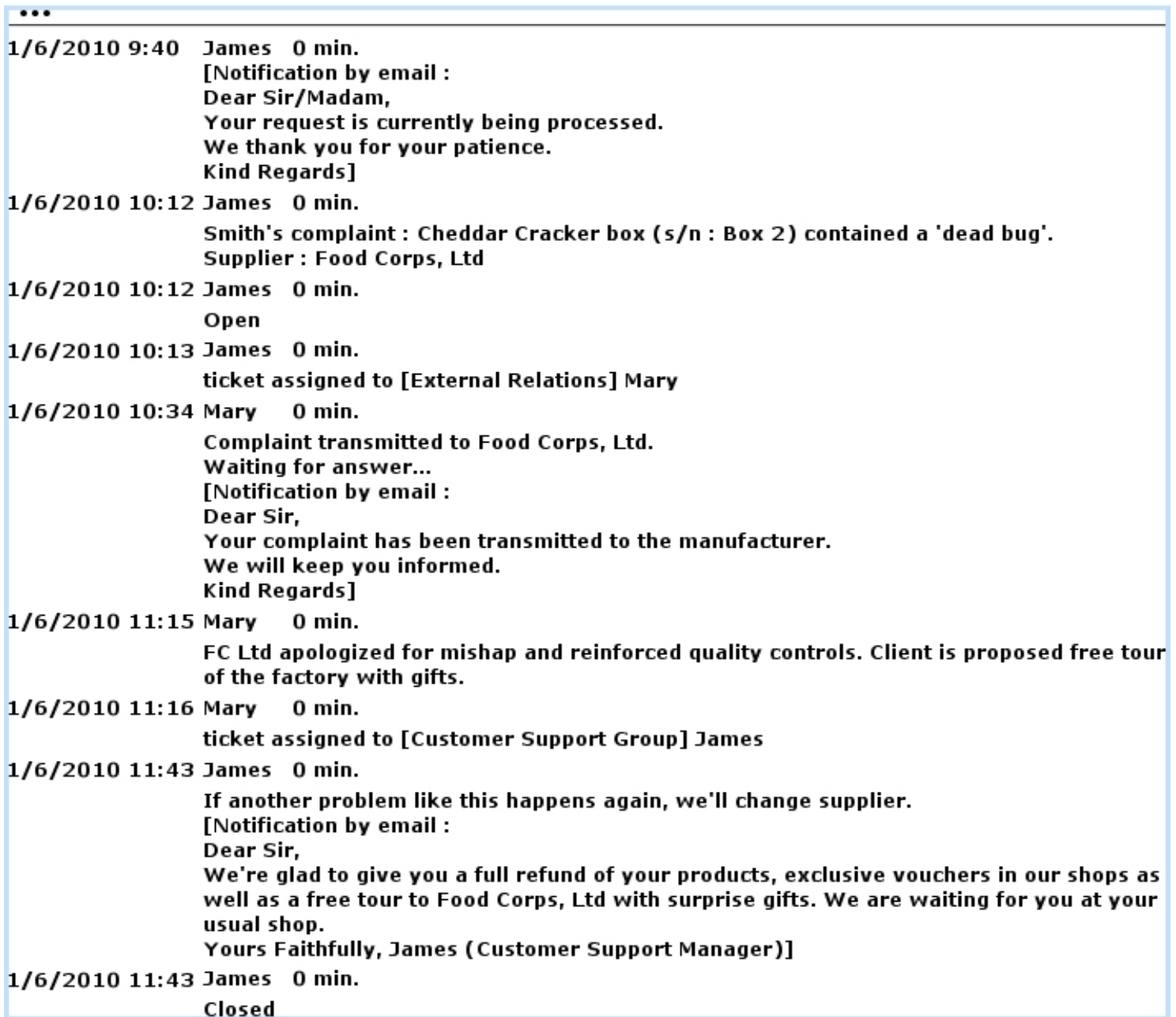
SMS Notification

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, A.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 : James on  Monday 02 January 2012 

Statistics for James - 02/01/2012

9h30	9h45	<p>NewTicket (Smith.John)</p> <p>Ticket (Smith.John)</p> <p>Action : [Notification by email : Dear Sir/Madam, Your request is currently being processed. We thank you for your patience. Kind Regards]</p> <p>Duration : 0 min.</p>
9h45	10h0	<p>Ticket (Smith.John)</p> <p>Action : Smith's complaint : Cheddar Cracker box (s/n Box 242) contained a 'dead bug'. Supplier : Food Corps, Ltd.</p> <p>Duration : 0 min.</p> <p>Action : Open</p> <p>Duration : 0 min.</p> <p>Action : ticket assigned to [External Relations] Mary</p> <p>Duration : 0 min.</p>
14h0	14h15	<p>Ticket (Smith.John)</p> <p>Action : If another problem like this happens again --> change supplier</p> <p>[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)]</p> <p>Duration : 0 min.</p> <p>Action : Closed</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
TOTAL	8	8	5	3	0	0	0	0	0	0	0	0	0

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
TOTAL	72	70	15	0	54	1	0	2	1	0	1	0	0

Figure 8.15: This table takes interest into a particular category.

Chapter 9


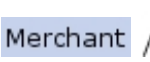
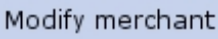
General Configuration

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: RFC Palo Alto Branch

Address: 63 Trouble Water Bridge

Postal code: 94300 City: Palo Alto

Country: USA

Tel: 555 4565 Fax:

Email: rfc_ll@mailserv.com

Add

Figure 9.3: Defining other offices.

General / Modify merchant / **Merchant addresses** :

Merchant addresses

Select address: RFC Palo Alto Branch New address

Name: RFC Palo Alto Branch

...

Figure 9.4: Modifying alternative address.

General / Modify merchant / **Client preferences** :

Client preferences

Client logins local 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

Modify

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] :
Total: 1.00 USD (VAT excl.)	Total: 1.00 USD (VAT incl.)
VAT: 0.20 USD	
Total: 1.20 USD (VAT incl.)	

- 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 (B.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:	<input style="width: 80%;" type="text" value="CR 1"/>
Shop:	<input style="width: 80%;" type="text" value="Iguana Food Store"/>
Delivery method:	<input style="width: 80%;" type="text" value="Pick up order at Iguana Food Store"/>
Payment method:	<input style="width: 80%;" type="text" value="<All payment methods>"/>
Billing method:	<input style="width: 80%;" type="text" value="<None>"/>
Account:	<input style="width: 80%;" type="text" value="Cash-box - C#1"/>

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 (B.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		
admin	Jones Jack	Administrator	27/5/2011 12:02	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
bobzmu	Zmuda Robert	Customer Support Group	27/5/2011 8:30	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
Dick	Malone Richard	Sales Department	30/5/2011 7:25	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
Harry	Robbs Harry	Sales Department	1/6/2011 9:22	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
James	Sawyer James	Customer Support Group	26/5/2011 15:32	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
Jane	Kovács Jane	Accounting	27/5/2011 09:26	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
Karen	Winston Karen	Accounting	1/6/2011 13:02	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
lavereau	Lavereau Dwayne	External Relations	27/5/2011 12:43	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
Mary	Russell Mary	External Relations	26/5/2011 14:27	<input type="button" value="Modify"/>	<input type="button" value="Disable access"/>
Tom	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*.

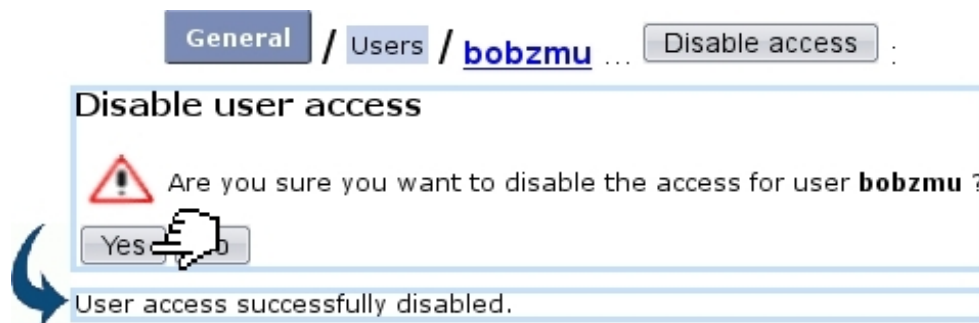
There, a menu provides a specific user status along which to search users : enabled/disabled users, or all of them. Also, it is possible from here to add a new user (9.4.4).

By clicking **Search**, a user list is then displayed with the following data/actions for each user :

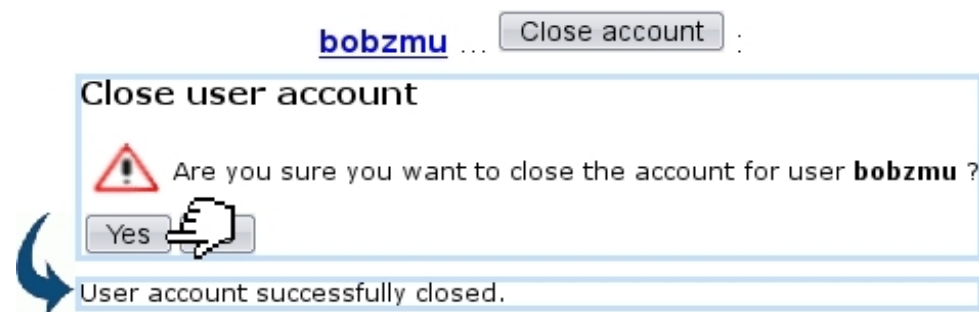
- username, as a click-link to her/his *View User Page* ;
- full name and user group ;
- last login date ;
- a **Modify** button leading to her/his *Modify User Page* (Fig.9.17) ;
- according to the status of the user, various buttons to perform actions related to user access to Blue Chameleon (9.4.3.1).

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'.

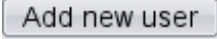


In order to flag a user whose access has been disabled as definitely out, it is possible then to **Close account** of user.

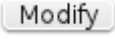


9.4.4 Creating users

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.

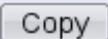
9.4.5 Configuring users

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 (C) 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 B 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:	Delete/Create/Modify	Delete/Create/Modify

[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 (B.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 (B.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"/> RFS Hot Line/ RFS HotLine 800- At-Home Help, basic <i>At-Home Services / At-Home Services</i>	100.00	0.10 USD	0.00 USD	0.00 USD
<input checked="" type="checkbox"/> RFS Hot Line/ RFS HotLine 800- At-Home Help, basic	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 (B.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

General / Misc / Images :

View **article type** images
 View **category** images
 View **icon** images
 View **key** images
 View **merchant logo** images
 View **normal** images
 View **shop logo** images
 View **all** images

View images 

View images

Upload new image 

Cracker box pic

Image type: Shop Logo Image |

Width:

Height:

File: /root/Iguana_Store_pic.jpg

Type: jpg |

Description: Iguana Food Store logo




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:

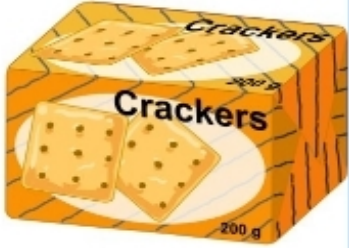


Figure 9.24: Adding an icon for an article.

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 (B.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).

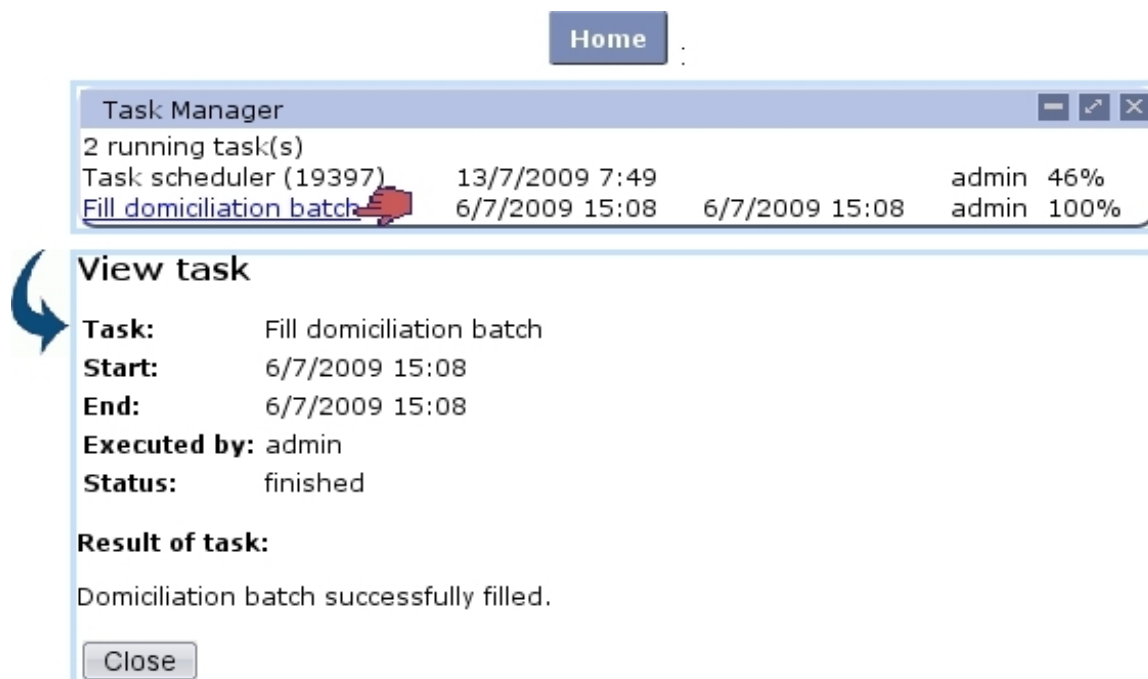


Figure 9.25: The system task manager event control, showing one running task and one finished ; accessing the details of the latter.

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.

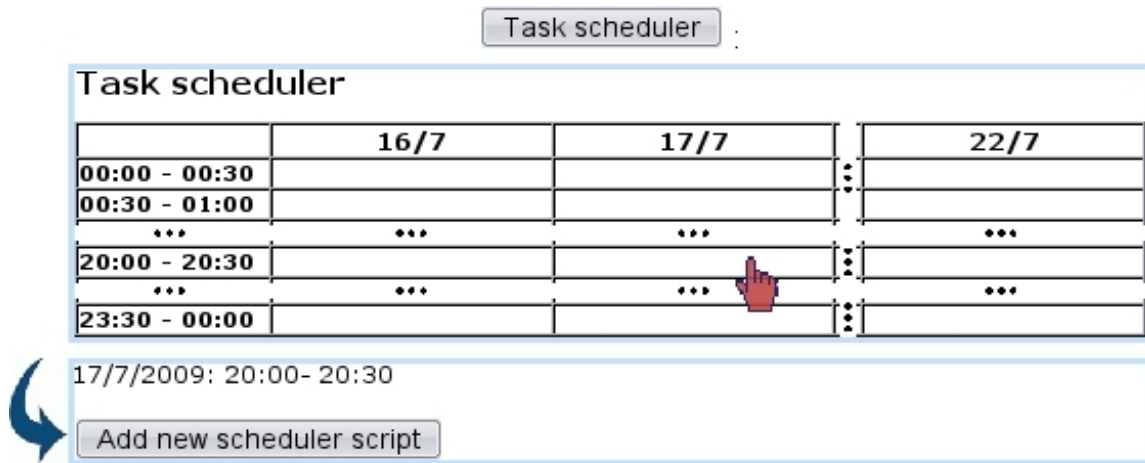


Figure 9.27: Selecting a day and a time interval to schedule tasks.

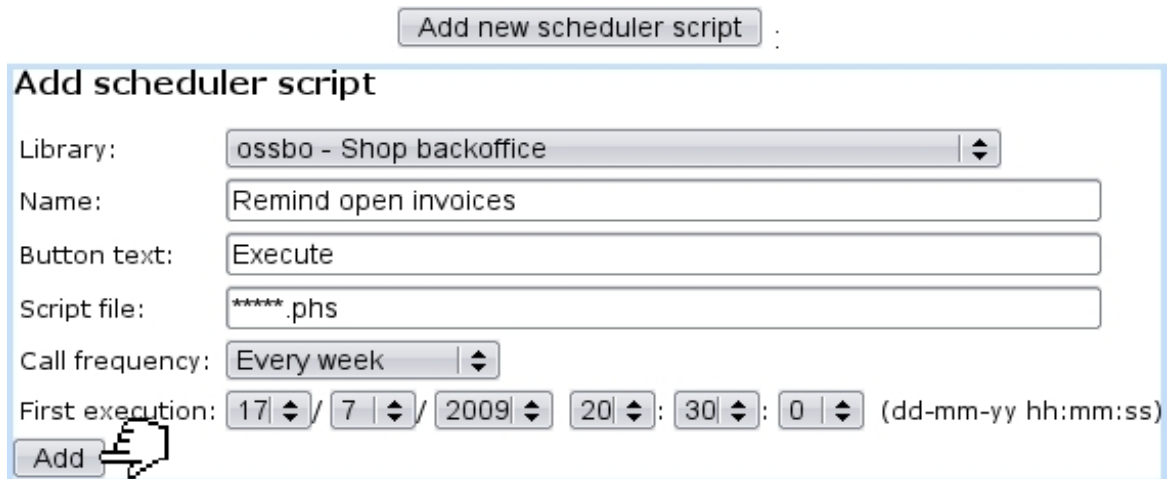


Figure 9.28: Building a scheduler task that consists in weekly calling in the script to remind open invoices.

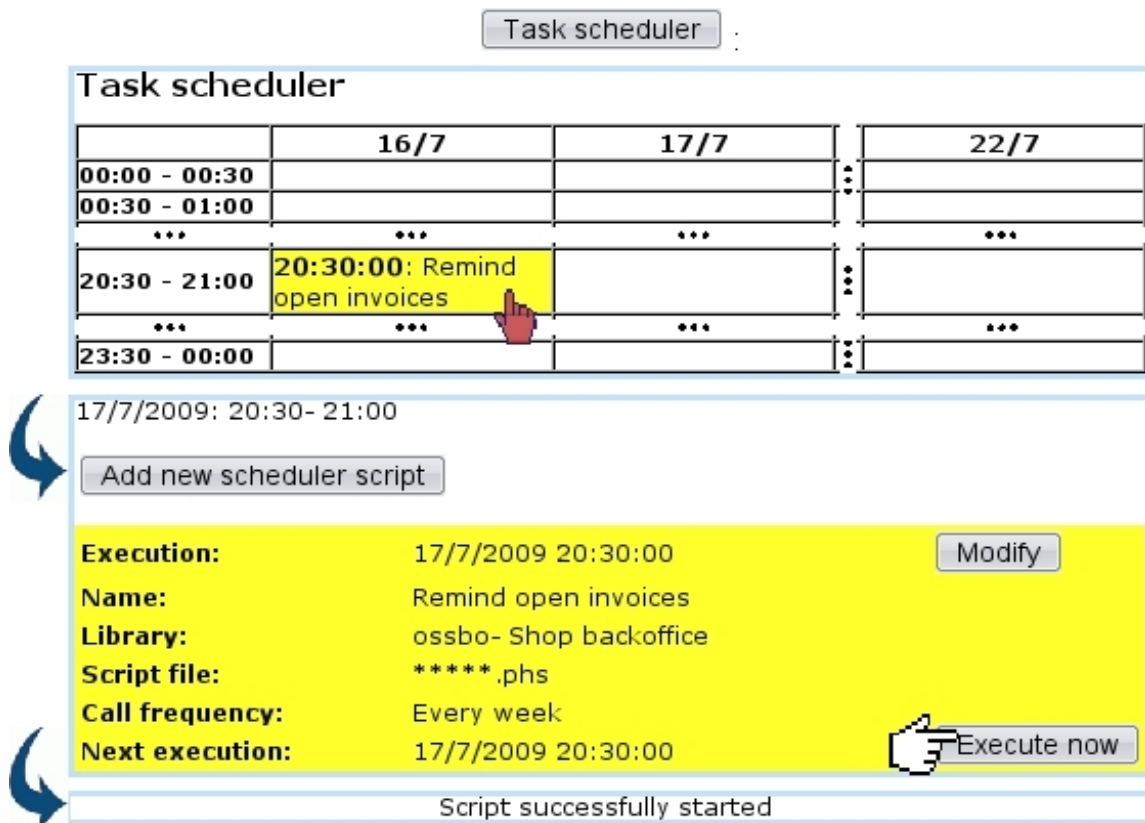


Figure 9.29: Launching the (weekly) execution of a scheduler script.