

BLUE CHAMELEON : Article Management

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Chapter 3

Article Management

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

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

3.1 Basic article management

3.1.1 Building your article database



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

Article management

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

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

Add article

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


Add 

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



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

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

The first drop-down menus let you choose :

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

button leading to :

Modify category list

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

*** **undefined** ***

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

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

Other menus deal with various article options, pertaining to :

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

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

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

3.1.2 Article types and categories



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

Article type management

and

Category management

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

3.1.2.1 Adding a new article type

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

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

Add article type

Image:

Language **English**:
Type name:

Language **French**:
Type name:

Language **German**:
Type name:

Visibility:

Stock support:

Add

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 **Articles** / **Articles** **Search article**, a button found at the bottom of the **Articles** / **Articles** page.

Articles / **Articles** / **Search article** :

Search articles

Article name:	<input type="text"/>	Code:	<input type="text"/>
Article type:	<All types> ▾	Status:	<All> ▾
Category:	<All categories> ▾		
Usage type:	<All> ▾	External account:	<All> ▾

Search

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

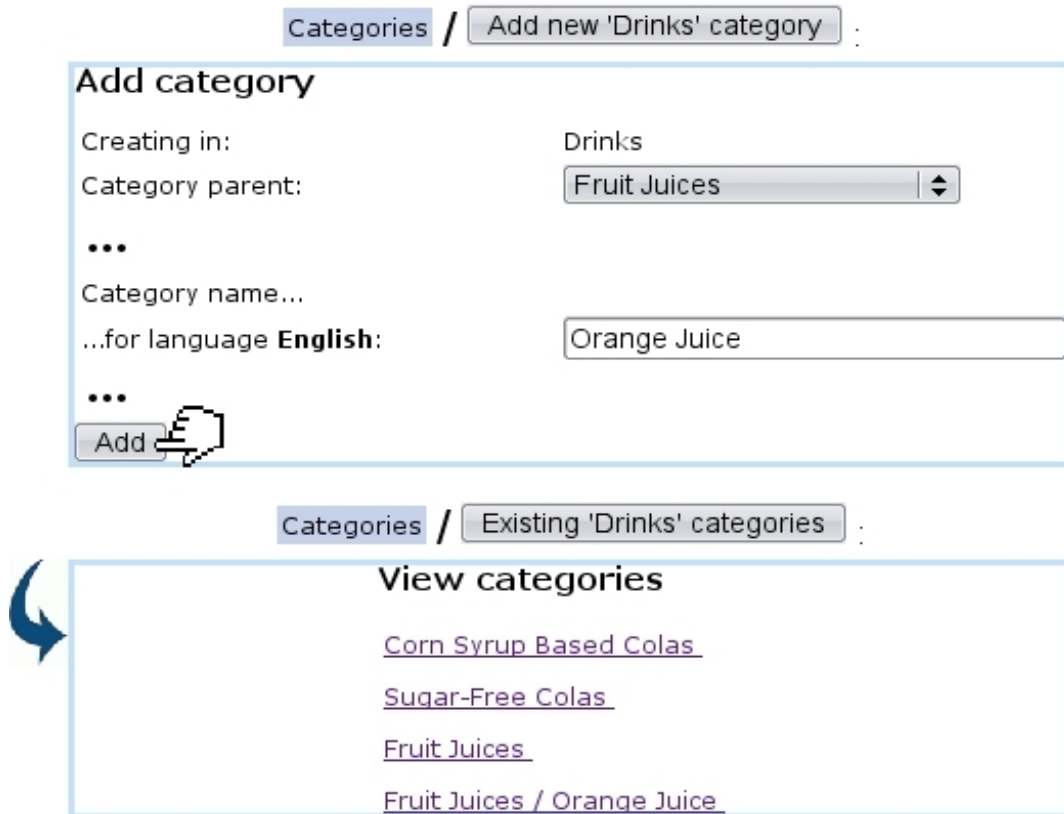


Figure 3.9: Creating another level of classification.

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.

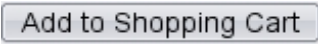
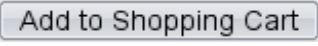
3.3.4.2.1 Article ordering level Category creation includes an 'Article ordering level:' menu that includes 'Front-office and back-office level 0', as well as different levels of back-office.

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).

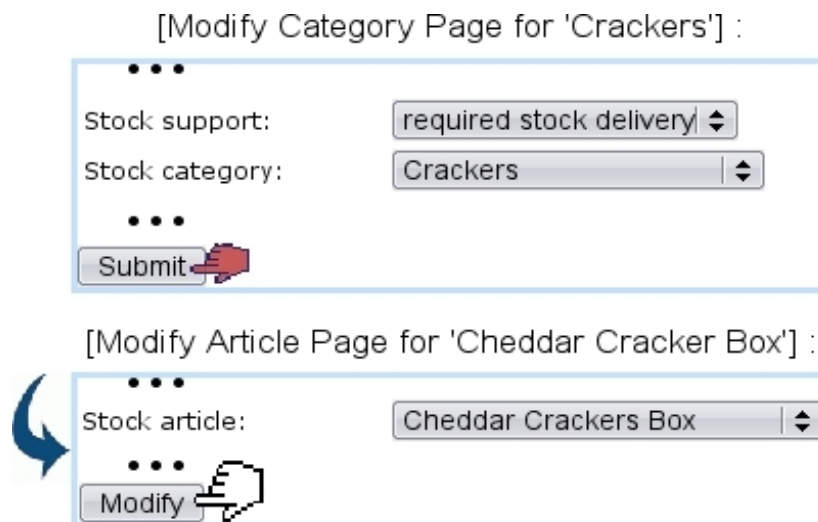


Figure 3.10: Once a category enables stock support, the articles that depend from it provide a menu where they can be associated with a stock article.

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.

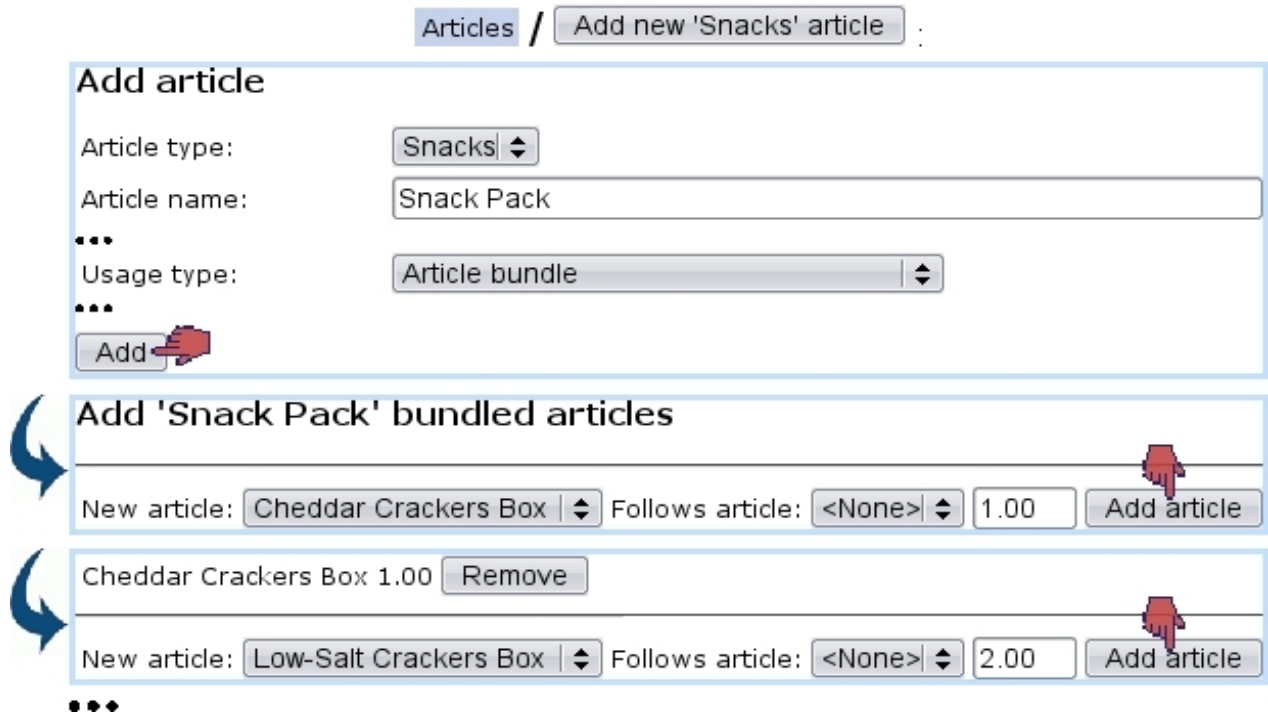


Figure 3.11: Creating an 'article bundle' : various articles are picked and gathered.

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 (11.2) under the element

Index management

[In Development]

3.5.2 Keys



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

Key management

[In Development]

[Articles](#) / [Configuration](#) / [Variable detail keys](#) / [Add new key](#)

Add var detail key

Key type:


Article type:

Language **English**:

Key name:

...

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



100% Pure, 1liter

Price: 1.50 USD Enter quantity:

Available

Origin:

You can always remove it later

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

3.5.2.1 Search keys

[In Development]

3.5.2.2 Detail keys

[In Development]

3.5.2.3 Variable detail keys

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

3.6 Stock management



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

Stock management

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

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

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



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

3.6.1 Basic creating of stock database

3.6.1.1 Creating stock locations

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

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

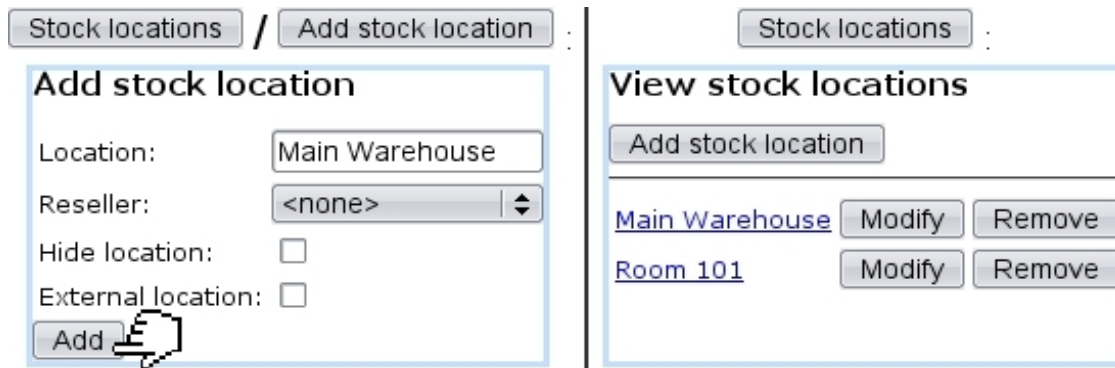



Figure 3.15: Creating and viewing stock locations.

3.6.1.2 Creating and managing suppliers



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

Supplier management

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

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

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

3.6.1.3 Creating and managing stock categories

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

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

General / Merchant / Suppliers / Add new supplier

Add supplier

Company name *:

Contact person:

Address line 1 *:

Address line 2:

Address line 3:

Zip code * / City *:

Country *:

VAT #:

Tel. * / Fax:

E-mail address:



(*) required

Figure 3.16: Adding a supplier.

Suppliers / Add new supplier

 [Food Corps, Ltd](#)

View supplier

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

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) ;

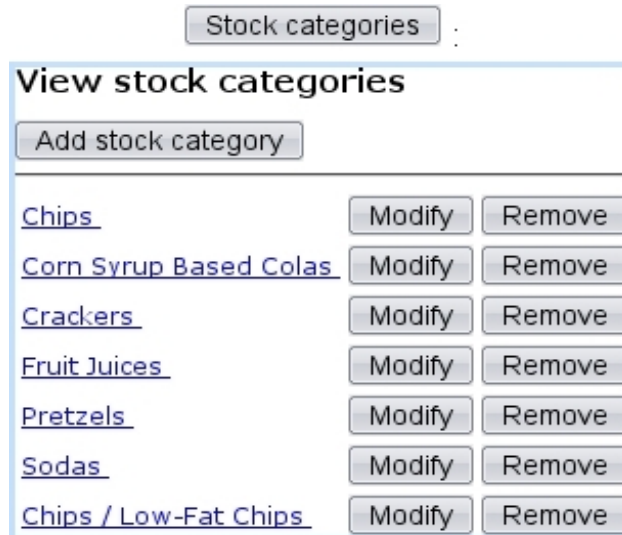


Figure 3.19: Displaying current stock categories.

- 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 [Stock entry](#) button.

3.6.3.1 With a supplier document

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

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

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

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

Stock entry / New document :

Add new supplier document

Supplier:

Reference:

Description:

Comment:

Document date: - -

Figure 3.22: Creating a supplier document.

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

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

3.6.3.2 Without a supplier document

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

Stock entry / New document / Add :

Stock entry

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

[<none>](#)

[Chips](#)

[Low-Fat Chips](#)

[Corn Syrup Based Colas](#)

[Crackers](#)

[Fruit Juices](#)

[Pretzels](#)

[Sodas](#)

Stock entry

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

Stock article: Cheddar Crackers Box ▾

Location: Main Warehouse ▾

Use barcode reader

Select

Add serial numbers into stock

Box 1 Remove

Add

Validate Cancel

•••

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

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

3.6.3.3 Managing supplier documents



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

Supplier document access rights

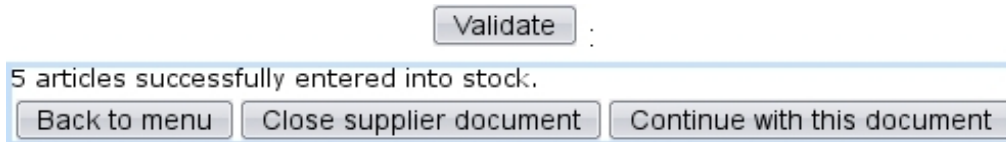


Figure 3.24: The conclusion screen after having successfully created a new stock entry.

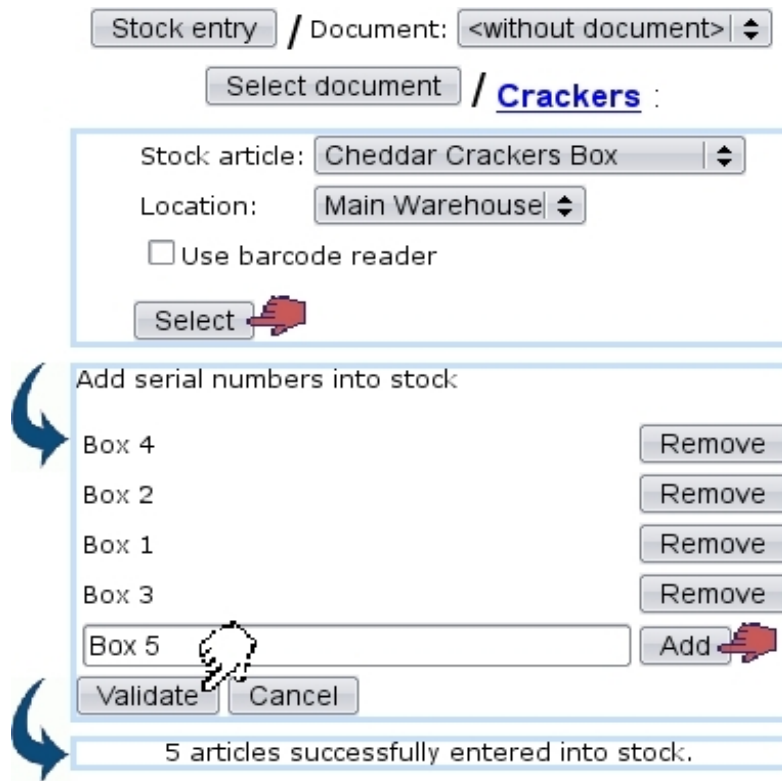


Figure 3.25: The whole process to greet a stock entry for article *Cheddar Crackers Box*, with suppliers 'disabled'.

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

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

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

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

Supplier documents :

View supplier documents

Supplier:

Date	Supplier	Reference	Number	Status	
14/2/2011	Food Corps, Ltd	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.

Supplier documents / **REFC9876** Close document

Close supplier document

Document number: 3
Supplier reference: REFC9876
Document date: 27/5/2010
Supplier: Food Corps, Ltd
Description: Supplier Doc
Created by: Jack Jones
Last modification by: Jack Jones (27/5/2010 10:00)
Status: opened

Qty	Article	Unit price	Total price
5	Cheddar Crackers Box	0.75	3.75
	Box 2	sold 0.75	
	Box 3	sold 0.75	
	Box 4	sold 0.75	
	Box 5	removed 0.75	
	Box 8	out of order 0.75	
Total price:			3.75
Confirmation:			0.00

Close document

Supplier document **REFC9876** successfully closed.

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.

Supplier documents :

View supplier documents

Supplier: Food Corps, Ltd | closed | Search

Add new supplier document

Date	Supplier	Reference	Number	Status	
27/5/2010	Food Corps, Ltd	REFC9876	3	closed	Open document Modify

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.

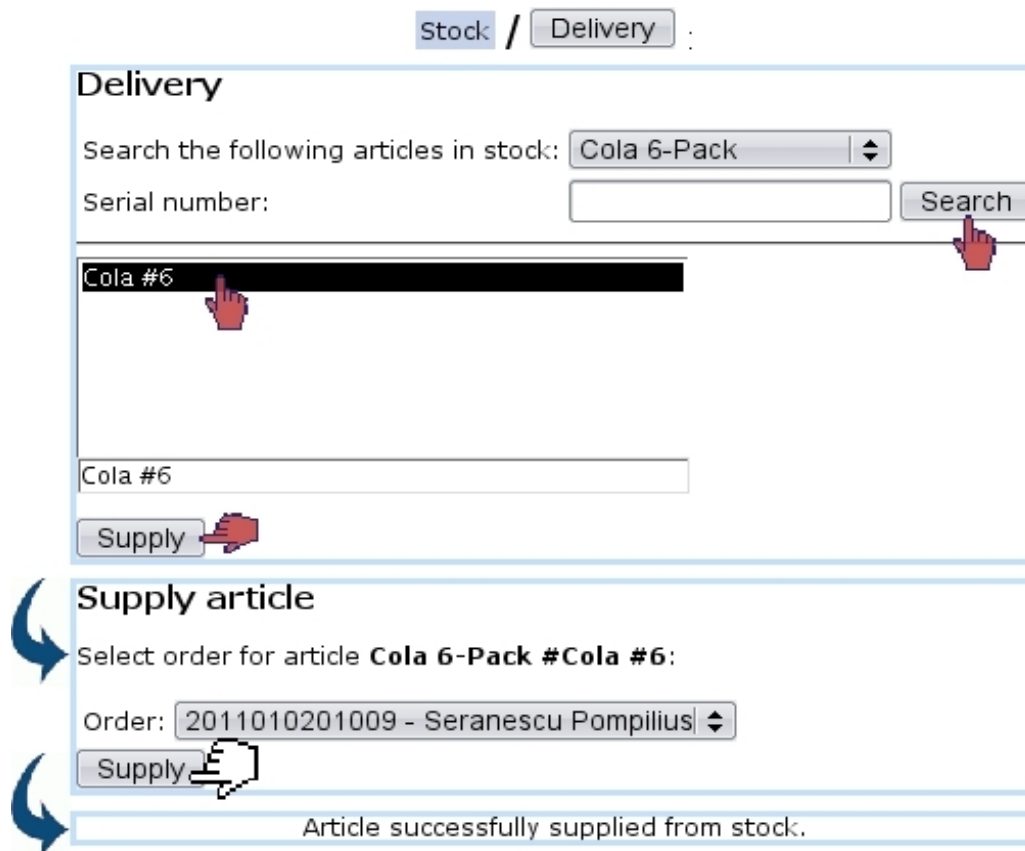

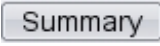


Figure 3.30: Using stock items to supply a particular order.

3.6.5 Managing stock items

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

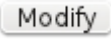
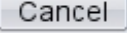
3.6.5.1 Stock summary

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 :


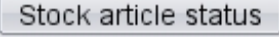
- a reference date until which orders are taken into account ;
- a specific stock category (3.6.1.3) ;
- comparison to the number of articles ordered ;
- the hiding of articles with null quantities to lighten the display ;
- a breakdown by stock locations (3.6.1.1), whether they are hidden or not.

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 :

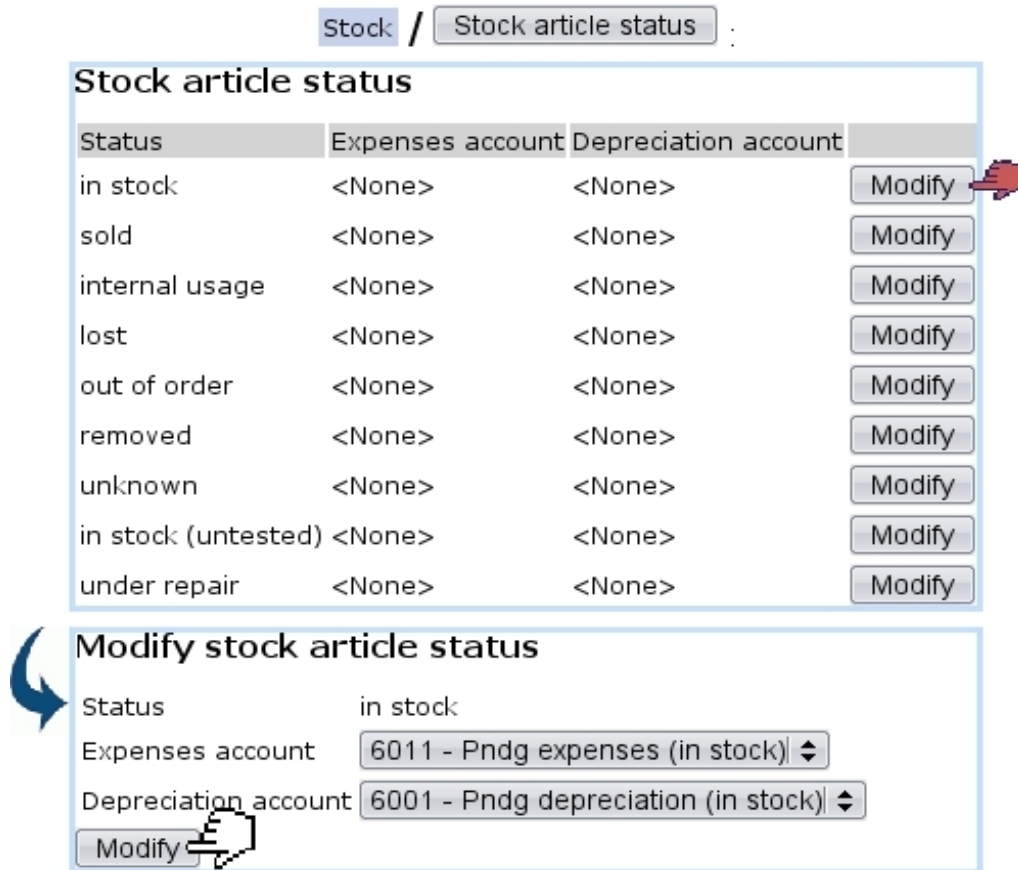


Figure 3.32: Associating a stock status with expenses and depreciation accounts.

- 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).

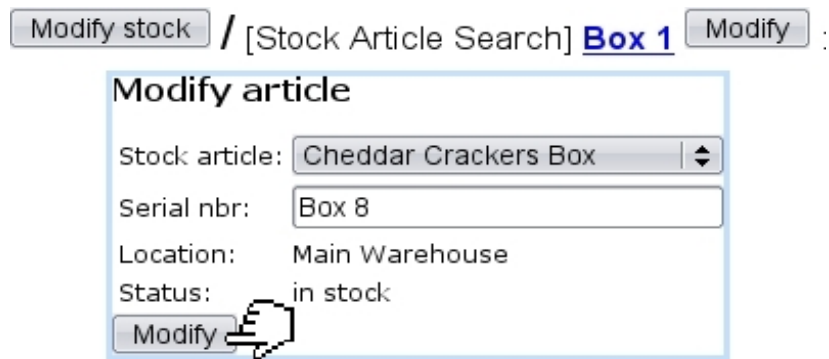


Figure 3.36: Changing the serial number of a stock item.

3.6.5.6 Stock article statuses

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

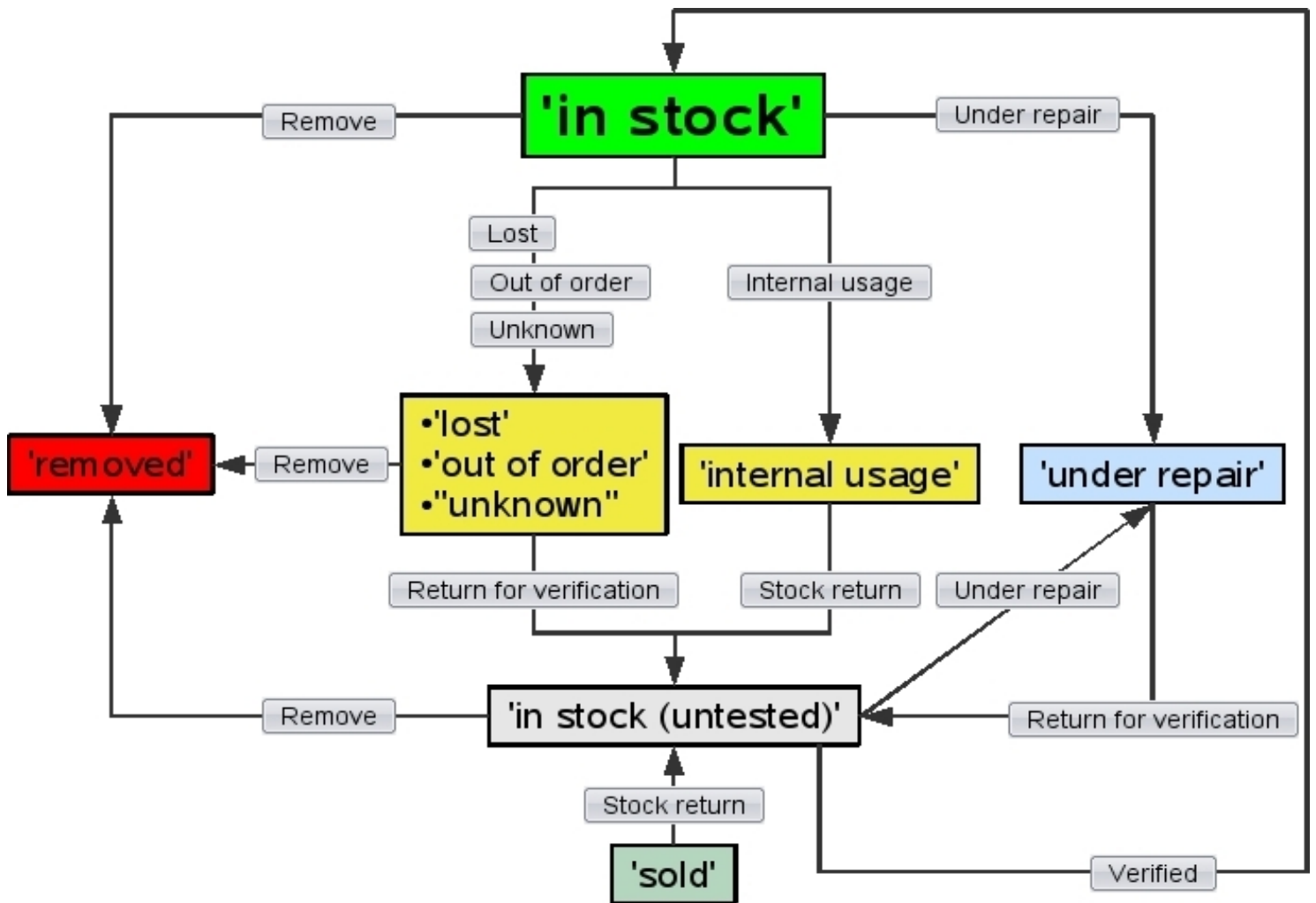
- 'in stock', available for each stock location (3.6.1.1), for instance 'in stock (Main Warehouse)';
- 'in stock (untested)', for articles that had been returned to stock (3.6.5.9) but have not been verified (3.6.5.11) yet ;
- 'sold', for ordered and delivered items ;
- six other statuses ('under repair',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

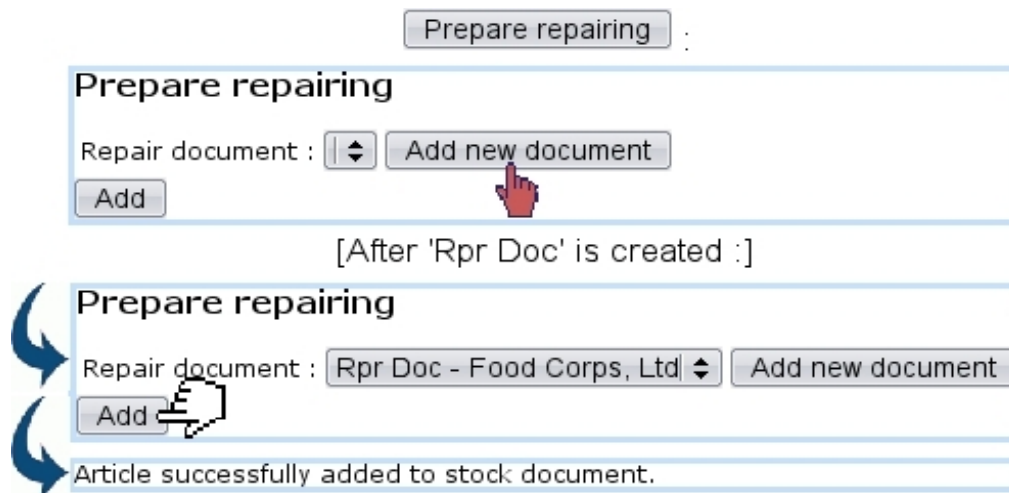


An item can also be returned from the Shop Sale Page (4.6.4).

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* :



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

3.6.5.12 Definitely discarding an item

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

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

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

3.6.5.13 Transfers

Through time, some stock items might be needed to moved be 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**.

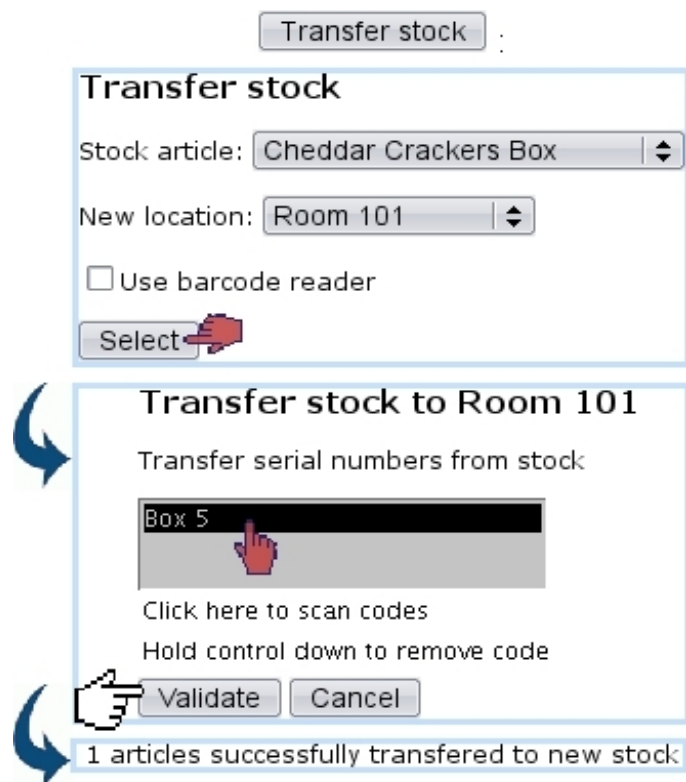


Figure 3.39: Transferring a stock item from one location to another.

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**.

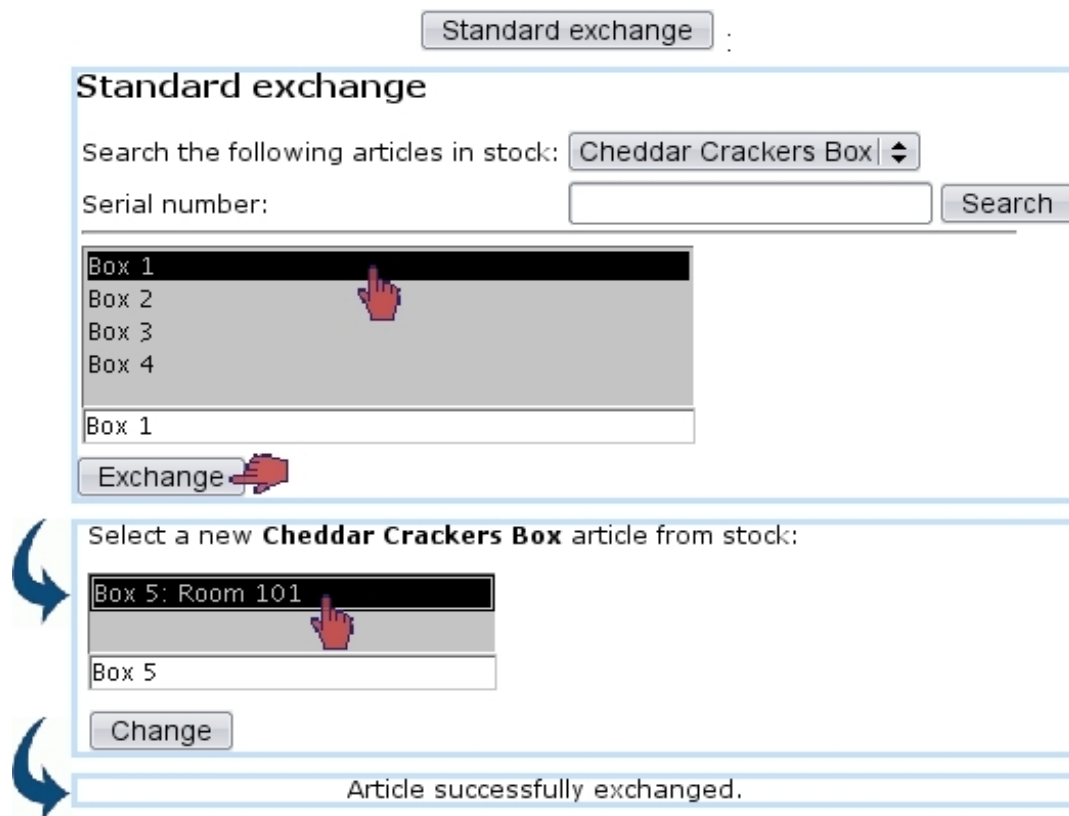


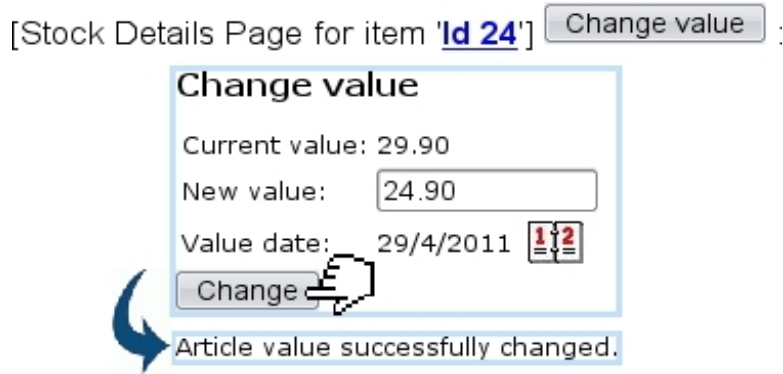
Figure 3.40: Exchanging the respective locations of two stock items.

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
<u>Id 24</u>	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
<u>Id 24</u>	Pocket-sized McGuffin	15/2/2011	Room 101	in stock	29.90	29.90		

Figure 3.44: Viewing a stock document.

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

Print :

Print stock document

Model:

[Result on generated PDF] :

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

Subscription management

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

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



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

3.7.1 Subscription basics

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

3.7.1.1 Creating a subscription

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

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

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

Add article

Article type: At-Home Delivery ▾

Article name:

Order label:

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 Modify subscription prices 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 Existing subscriptions 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 Search

Set AHD Clear list set before filling Fill into this list Add new list

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 Suspend subscription (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: - - (DD-MM-YYYY)

Description:

[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: - - (DD-MM-YYYY)

Description:

[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.

2008060901004 Parker Ken At-Home Delivery, 1 Month **activated** /

Suspend subscription At-Home Delivery, 1 Month

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

Description:

2008060901004 Parker Ken At-Home Delivery, 1 Month **suspended** 9/6/2008

Figure 3.57: Suspending a subscription right on the moment.

2008060901005 Barnes Cletus At-Home Delivery, 1 Month **activated** /

Finish subscription At-Home Delivery, 1 Month

End of subscription: 11 - 6 - 2008 (DD-MM-YYYY)

Order	Client	Subscription	Status	Start	End
2008060901005	Barnes Cletus	At-Home Delivery, 1 Month	finished	9/6/2008	11/6/2008

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

2008061001001 Salazar Ramon At-Home Delivery, 1 Month **blocked**
 2008060901006 Durden Tyler At-Home Delivery, 1 Month **suspended** /

Restart subscription At-Home Delivery, 1 Month

Restart date: 11 - 6 - 2008 (DD-MM-YYYY)

Description:

2008061001001	Salazar Ramon	At-Home Delivery, 1 Month	activated	11/6/2008
2008060901006	Durden Tyler	At-Home Delivery, 1 Month	activated	11/6/2008

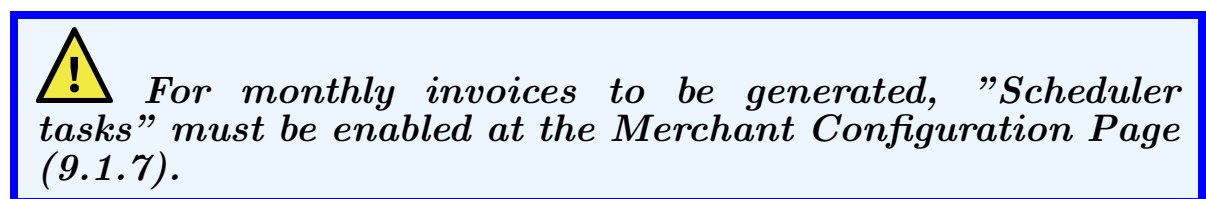
Figure 3.59: Putting blocked and suspended subscriptions back into the green 'activated' status.

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



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

3.7.2 Monthly invoices



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.

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.

3.7.2.2 Validating monthly invoices

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

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,...).

[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.

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

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: Set AHD

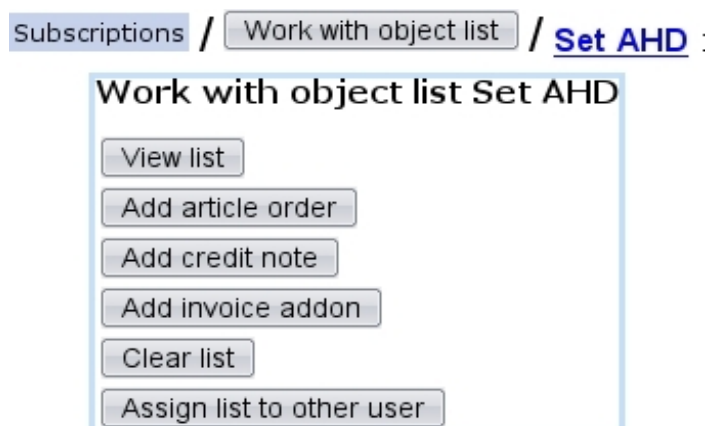
Comment: set for 'At-Home Delivery' subscriptions

Add

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 [Work with object list](#) provides the options shown at Fig.3.66.



Subscriptions / Work with object list / Set AHD :

Work with object list Set AHD

View list

Add article order

Add credit note

Add invoice addon

Clear list

Assign list to other user

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 [Fill into this list](#).

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).

Subscriptions / Search subscriptions :

Search subscriptions

...

Subscription status = Add

Subscription article = Add

...

Selected options:

and subscription status = finished

and subscription article = At-Home Delivery, 1 Month

Normal version sort by orders search canceled orders

Set AHD Clear list set before filling

All found subscriptions added to selected object set.

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

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.

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

At-Home Delivery, 1 Month / :

Lists featuring At-Home Delivery, 1 Month :

Usergroup : User : Last modified

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

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

3.7.4 Handling of subscriptions with consumptions

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

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

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

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

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

Add article

Article type: RFS Hot Line

Article name: Recipe Advice Line

...

Unit price: 10.00 (VAT incl.)

...

Usage type: Subscription with variable consumption

...

Add

...

Base quantity units: 1

Follow-up quantity units: 1

Quantity units type: minutes

Unit price: 0.1 (VAT incl.)

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

Display units type: minutes

Display units type label: Minutes

...

Modify

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

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

3.7.4.1 Adding a new consumption type

[In Development]

3.7.4.2 Managing existing consumption types

[In Development]

3.7.4.3 Subscription statistics

[In Development]