

# BLUE CHAMELEON : Client Management

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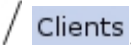
*download the relevant chapter or the **Blue Chameleon Full Documentation**.*

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# Chapter 2

## Client Management

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


All commands explained in this chapter are accessible from  / .



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

### Client management

## 2.1 Adding a new client

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

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

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

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

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

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

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

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

### 2.1.1 Types of persons/clients

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

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

### 2.1.2 Client attributes



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

#### **Client attribute management**

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

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

Clients / 
 Clients / 
 Add new client :

### Add client

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

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

Add
Cancel

Figure 2.1: Adding a new client.

### 2.1.2.1 Making some client data optional or mandatory

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

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

### Add client attribute

Attribute type:

Optional:  Yes  No

Validation script:

18

## 2.2.1 Running client searches

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

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

Clients / Clients :

**Search clients**

Name/Username:  Email/Tel:  Reference:

Address:  Zip code/City:  Country:

Domiciliation ref.:  Salesperson:  Credit class:

Type:  Clients:  Type of person/SLA:

Client since:

A - B - **C** - D - E - F - G - H - I - J - K - L - M - N - O - P - Q - R - S - T - U - V - W - X - Y - Z

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

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

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

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

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

## 2.2.2 Exporting client data

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

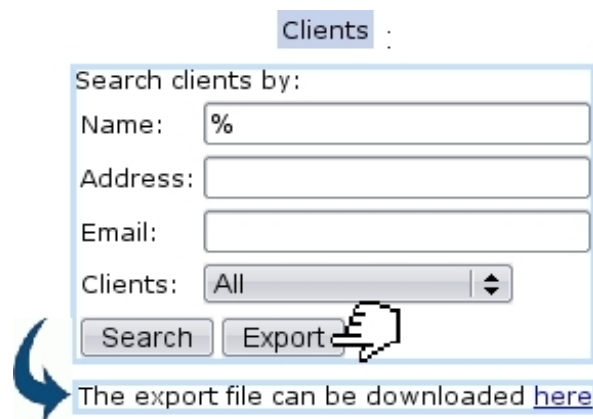


Figure 2.5: Generating an export file for all registered clients (as generated by using % character in the 'Name:' field).

## 2.2.3 Modifying client data

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

## 2.2.4 Transferring to another client

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

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

[Client Search] [Mayfield Herbert](#)

**Transfer client**

**Username:** Mayfield.Herbert  
**Name:** Mayfield Herbert  
**Address:** 32 Sycomore Avenue

**Zip Code / City:** 98045 North Bend  
**Country:** USA  
**Tel / Office:** 555 1223  
**Mobile / Fax:**  
**E-mail address:**

---

Transfer to one the following clients:

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

---

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

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

Keep original client account

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

## 2.3 The *Client Management Page*

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

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

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

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



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

### Client management

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

[show all details...](#)

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

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

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

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

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

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



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

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

[User Rights] **Bill set management**

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

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

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

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

## 2.4 Client lists

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

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

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

**Lists featuring Smith.John :**

Usergroup :  User :  Last modified

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

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

This pop-up features :

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

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

### 2.4.1 Adding a new client list

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

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

Name:

Comment:

**Insert Smith.John**

**Add new list**

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

## 2.5 Marketing campaigns

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

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

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

**Marketing campaign**

Classification	Clients
Standard	31

Figure 2.10: The *Marketing Campaign Page*.

### 2.5.1 Configuring marketing campaigns

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

- advertisements ;
- client classifications ;
- ad spaces.

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

### 2.5.1.1 Managing advertisements

[In Development]

### 2.5.1.2 Client classifications

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

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

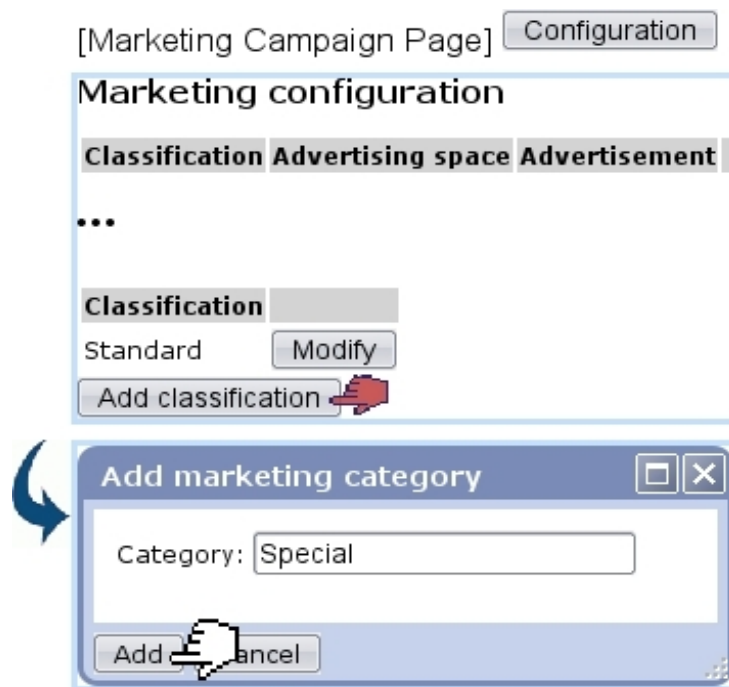
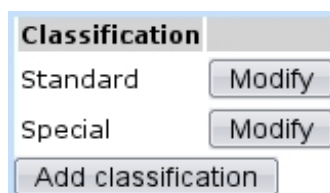


Figure 2.11: Adding the marketing category.

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



How client classifications are filled is explained at 2.5.2.

### 2.5.1.3 Advertisement spaces

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

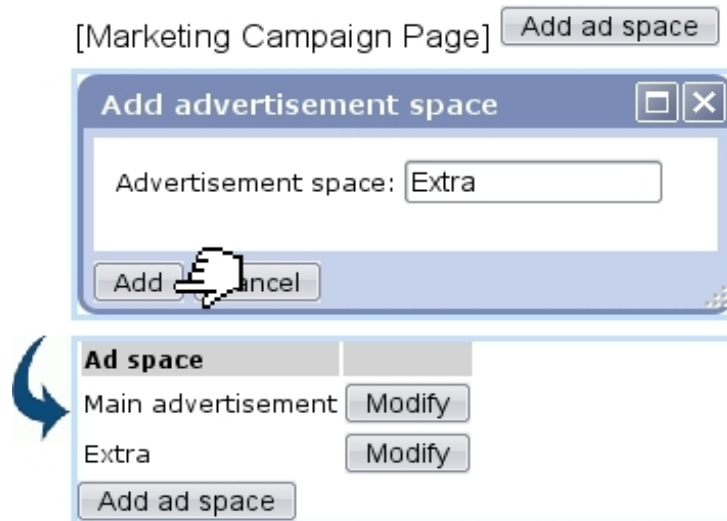


Figure 2.12: Adding an advertisement space.

## 2.5.2 Use of client classifications

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

### 2.5.2.1 Changing client classification

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

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

### 2.5.2.2 Initializing clients without a classification

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

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

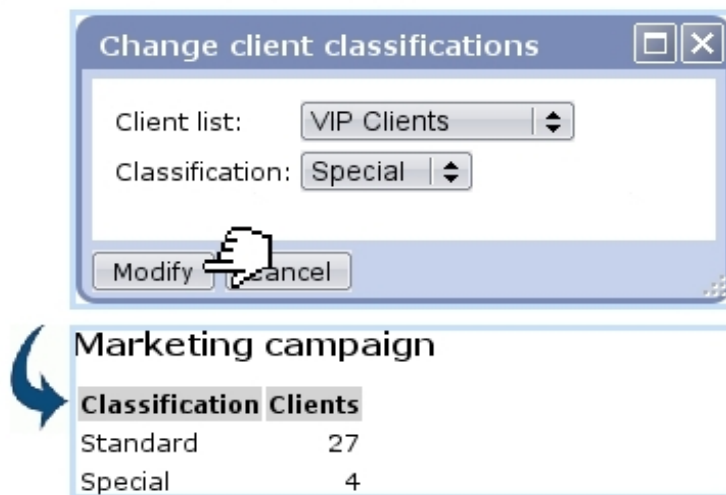
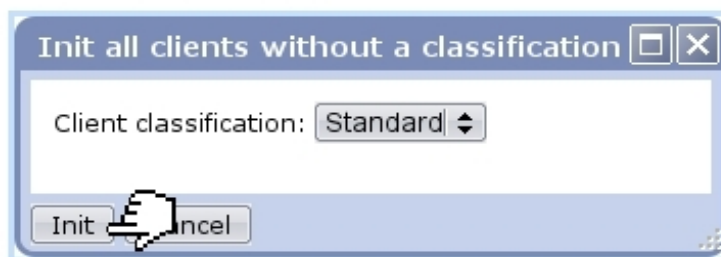


Figure 2.13: Putting the clients in a specific client list in a marketing category.

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



### 2.5.2.3 Resetting client classifications

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

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

