BLUE CHAMELEON : General Configuration

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December 19, 2013

Chapter 9

General Configuration

Blue Chameleon's great advantage is that is can be modeled to suit your needs, whether you wish to use rather the fewest options possible or on the contrary define your own elements in command groups.

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

9.1 The *Merchant Configuration Page*

The whole system that handles every functionality of Blue Chameleon is called a Merchant, and its configuration rules what is possible to do in every domain (client options, stock matters,...).

According to your needs and the kind of activity your company does, some options may be superfluous. Merchant configuration is performed via General / Merchant / Modify merchant, yielding a page displayed at Fig.9.1. From there, you can shape Blue Chameleon's possibilities according to your needs.

9.1.1 Merchant general information

On Fig.9.2 is displayed as an example what kind of information can be filled in. It is strongly advised that you fill in there your company's head office information, as the Merchant could be considered as the root from which everything is configured. If you have other places such as sale outlets, they will be inputed while creating shops (9.2).

If you have uploaded a Merchant logo picture (9.7.1), it is available in the eponymous menu. It is also advised that user group (9.4.1) Administrator is chosen.

Figure 9.1: The *Merchant Configuration Page*.

9.1.2 Merchant addresses

In addition to your company's head office information, you can define other addresses for other local offices, as shown in Fig.9.3.

These alternative addresses are featured on the page where print sets for invoices and reminders are defined (5.5.2.1).

Once defined, this alternative merchant address can be modified in the same page through a menu, and other other ones can be added (Fig.9.4)

9.1.3 Client preferences

They are featured in Fig.9.5.

- *Menus :* 'Client logins:'
  - client login can be disabled if you do not grant your clients any access ;
  - 'local logins' ;
  - 'logins through wallet'.
- *Toggles :*
  - client logins ;
  - the distinction between client types can be enabled : if so, while creating a new client (2.1), one new menu ('Type of person:') lets you pick between 'Physical person' and 'Corporate body' and an other one ('Type of client:') between 'Private client' and 'Professional client' ;
  - if the above was enabled, the 'Clients are private/professionals' toggle sets the default choice for the 'Type of client:' menu while creating a new client (which can be modified afterwards) ;

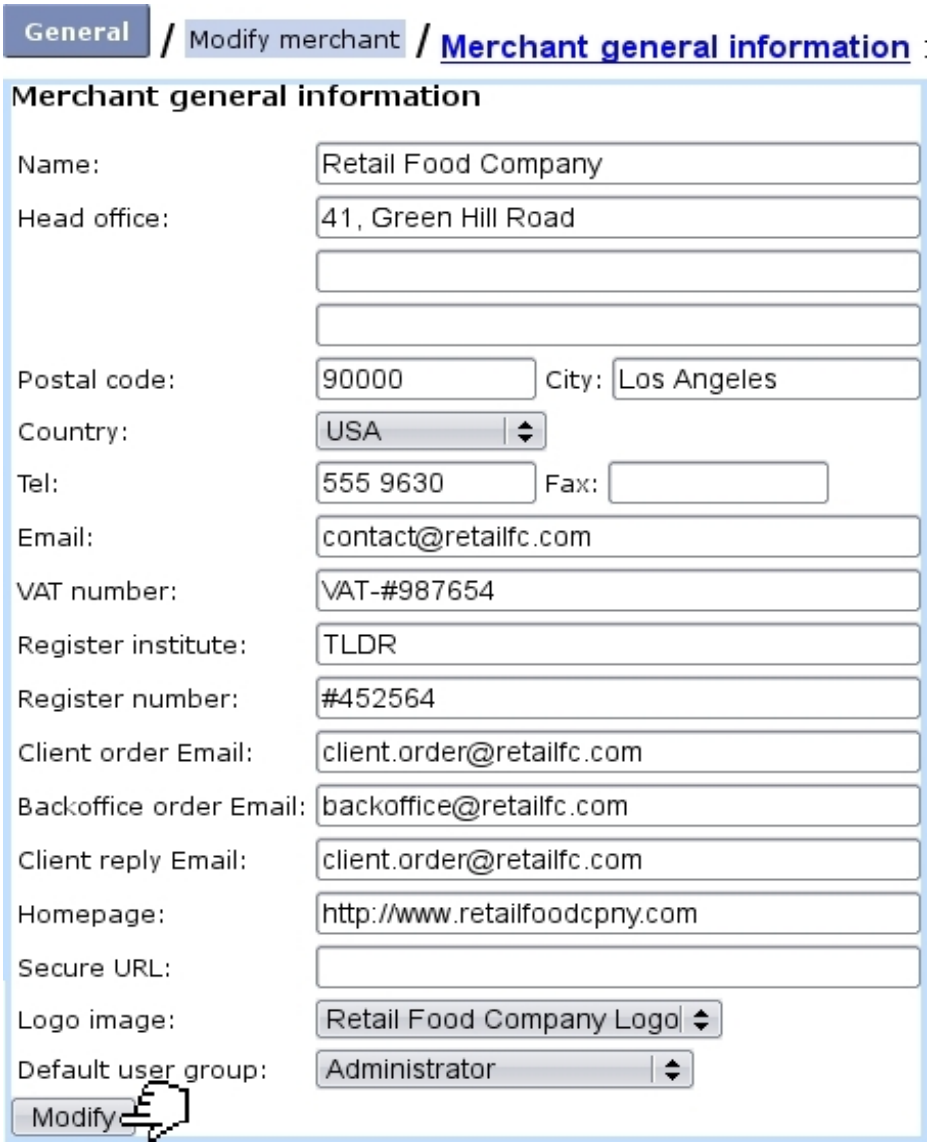


Figure 9.2: Here, set your company's head office general information.

– client account management.

9.1.4 Article preferences

They are featured in Fig.9.6).

- *Menus :*
  - 'Default article order:' rules how articles are be sorted whenever a list of them is displayed (e.g. when making an order) when <Default merchant order> has been selected for the related category's 'Article order:' menu (3.1.2.2) ;
  - if you want to use Blue Chameleon's stock features, it is mandatory that you define the 'Stock management:' drop-down menu as either 'Stock management

Figure 9.3: Defining other offices.

Figure 9.4: Modifying alternative address.

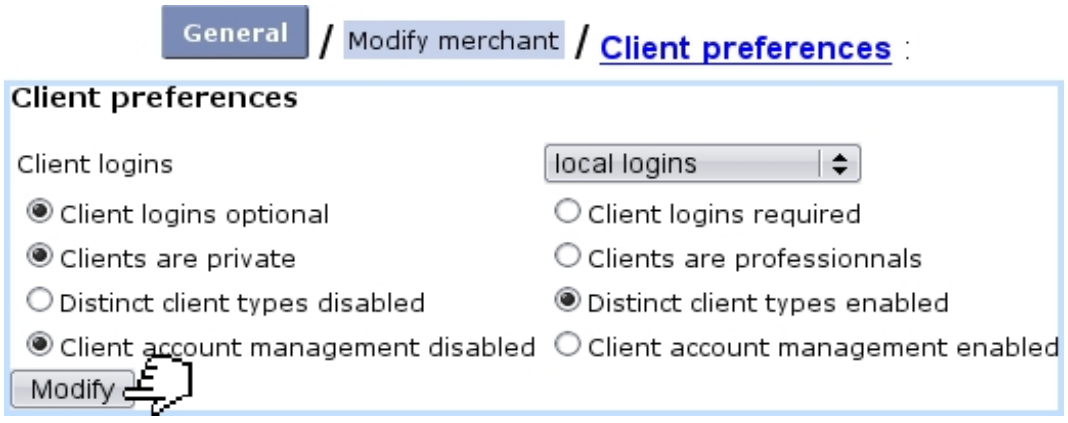


Figure 9.5: Choosing preferences for clients.

by counters' or 'Physical stock management' ; the choice between the two bear consequences on article (3.3.1.4 and article type (3.3.3.2) configurations ;

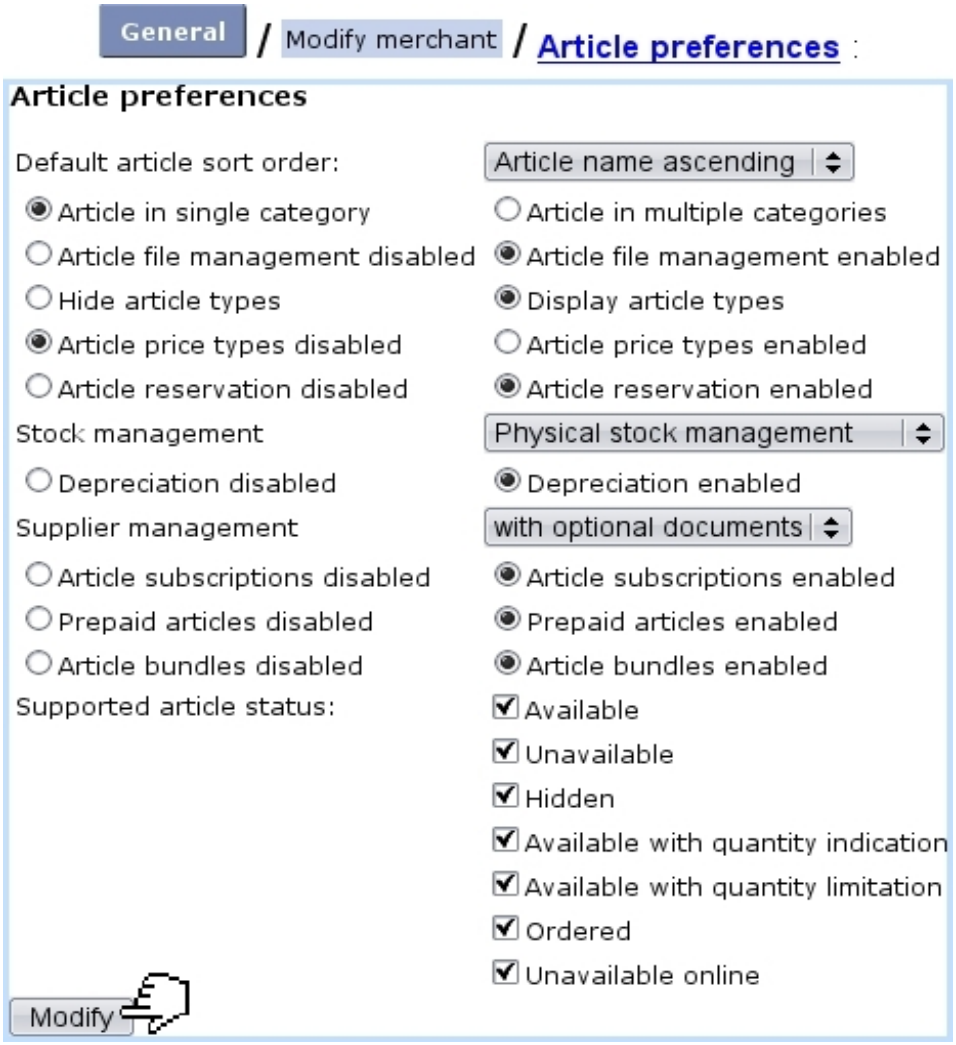


Figure 9.6: Choosing preferences when dealing with articles.

  - to enable suppliers (3.6.1.2), choose either 'with optional documents' or 'with required documents' at the 'Supplier support:' menu. The former is to be chosen if you want to be free to register stock entries with (3.6.3.1) or without (3.6.3.2) a supplier document, while the latter is to be chosen if you want to *enforce* the recording of a supplier document for each stock entry.

- *Toggles :*
  - articles may be allowed there to belong to more than one category ; in this case, while creating (3.1.1) or modifying (3.2.1.1) an article, the drop-down menu where the article's related category is picked is replaced by a Modify category list button ;
  - enabling 'Article file management' makes a Modify files button appear on the *Article Management Page* (3.2.1) ;
  - article types (3.1.2.1) can be hidden or shown : the former choice makes as if all article types had a 'hidden' visibility (3.3.3.1) ;

- enabling 'Article price types' makes a Modify special prices button appear on the *Article Management Page* (3.2.1) ;
- stock article depreciation (3.6.2) ;
- subscriptions, prepayments and article bundles, if enabled there, appears, in the 'Usage type:' menu (3.3.1.2) while creating an article.

- *Checkboxes :* article statuses (3.3.1.1) in use are picked from here.

9.1.5 Shop and order preferences

They are featured in Fig.9.7.

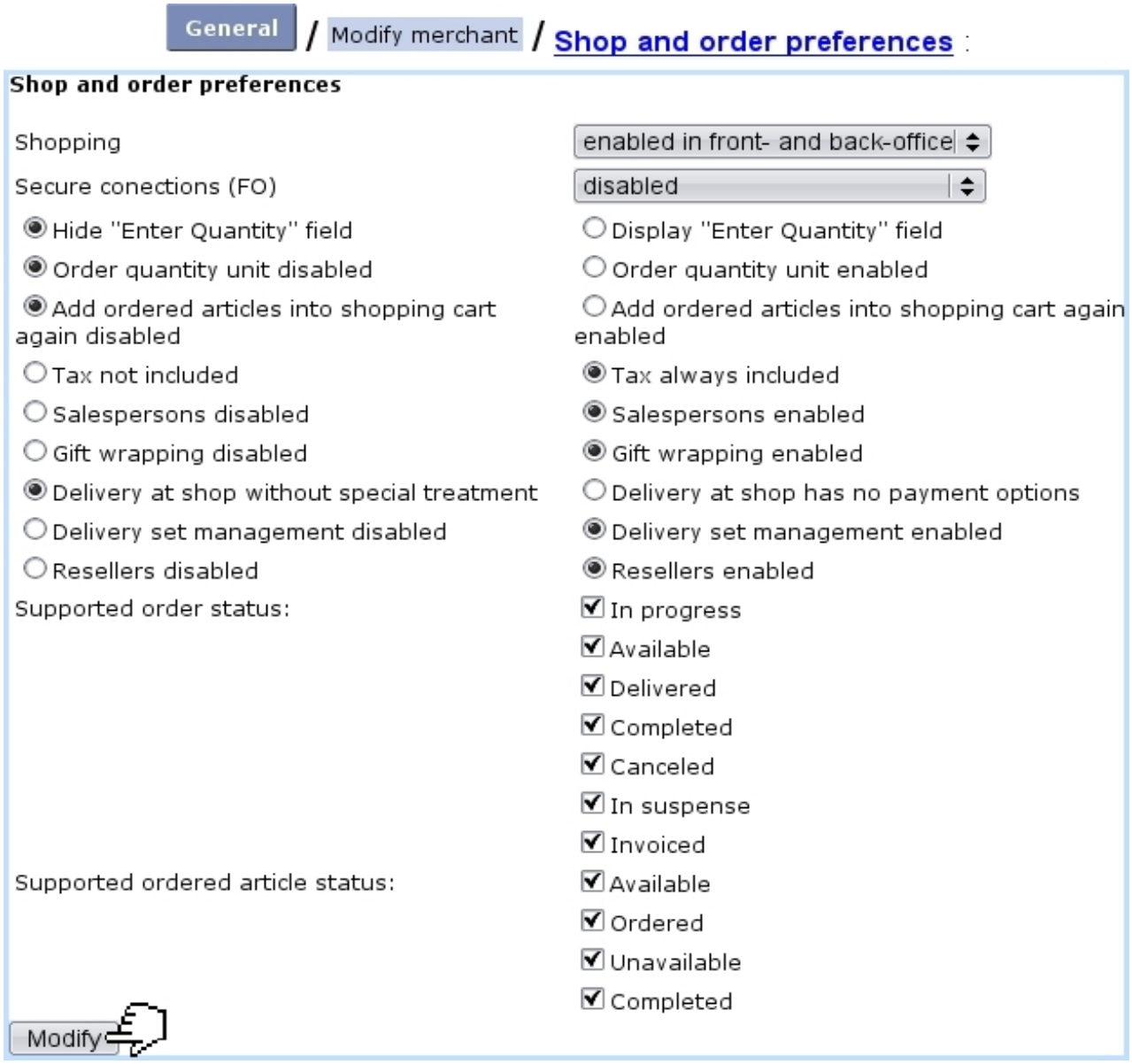
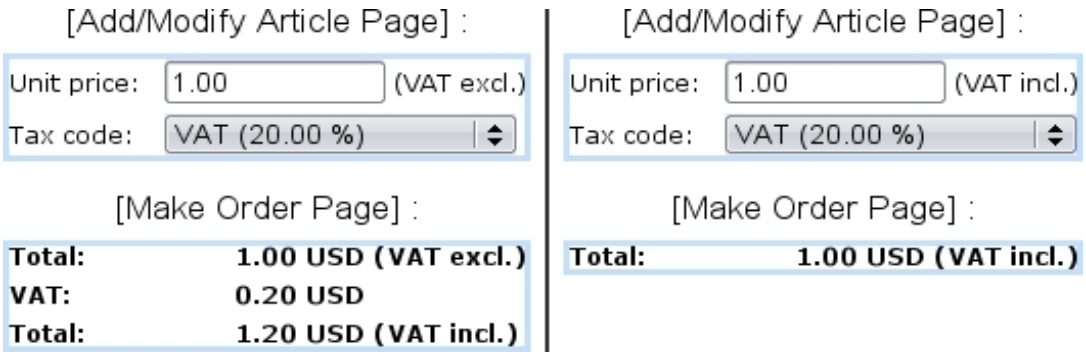


Figure 9.7: Choosing preferences when ordering.

- *Menus :*
  - 'Shopping' : to be able to make orders (4.1), any other option than 'disabled' must be chosen here ;
  - Secure connections.
- *Toggles :*
  - the shown/hidden '"Enter quantity field"' takes place during the first steps of an order (Fig.4.1) and lets user freely choose a quantity, otherwise quantity is fixed to 1 or, if applicable, to the one inputed in the 'Order quantity unit' field (see below) ;
  - enabling 'Order quantity unit' will make an eponymous field appear during the creation (3.1.1) or modification (3.2.1.1) of an article ; then, when preparing an order, the ordered quantity will have to be a multiple of that entered quantity, else there will be such a warning : "The article '...' can only be ordered by 3 units. The quantity has been changed from 1 to 3." ;
  - Add ordered into shopping cart again enabled/disabled ;
  - while creating articles (3.1.1) and ordering them (4.1.1), if you want taxes to be calculated afterwards (while at an order) on the basis of the unit price, choose 'Tax not included' ; on the other hand, if you want to input unit prices already containing tax, choose 'Tax always included' :



  - Delivery at shop without special treatment/Delivery at shop has no payment options ;
  - are enabled/disabled there : salespersons (9.6), gift wrapping (4.1.3), delivery method sets (4.5.2), resellers (9.3).
- *Checkboxes :* order and ordered article statuses in use (4.1.5) are picked from here.

9.1.6 Invoice and payment preferences

They are featured in Fig.9.8.

- *Menus :*

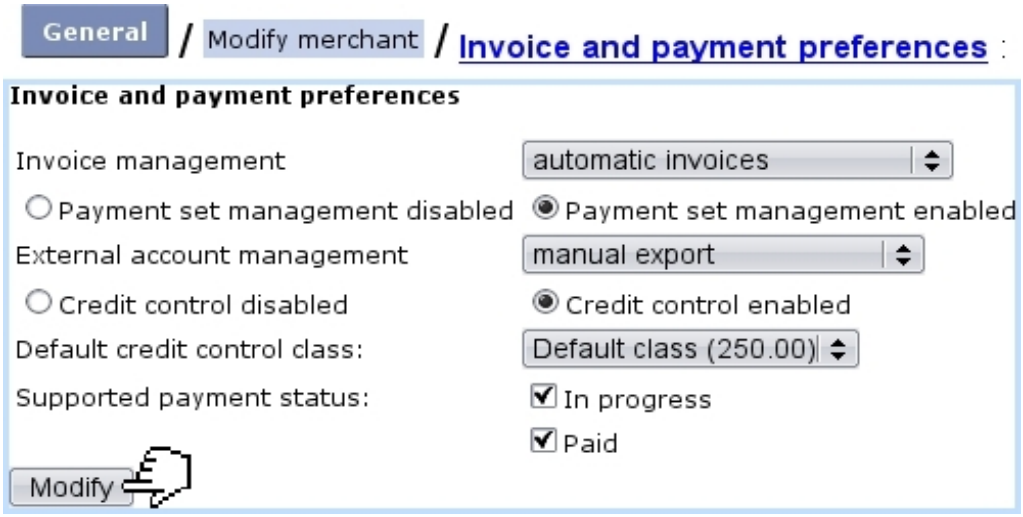


Figure 9.8: Choosing preferences related to invoices, payments and credit control.

- 'Invoice management', which apart from being disabled, can be set to either automatic or manual ;
- 'External account management' menu manages whether/how the External System (6.1) is used : to do so, is necessary to choose any other option than 'disabled'. The 'manual' or 'automatic' options then decide whether invoices and payments aremanually exported (6.1.2) or as soon as they are created (6.1.3) ;
- the default credit control class (5.6.6.1), which in case of a wanted use must be enabled with the toggle, is chosen from the eponymous menu.

- *Toggles :* enable/disable the use of payment method sets (6.4.2) and of a credit control class.
- *Checkboxes :* payment statuses in use (5.6.1) are picked from here.

9.1.7 Miscellaneous preferences

They are featured in Fig.9.9 ; here is set the enabling/disabling of menu custom scripts and system task (9.8) managements.

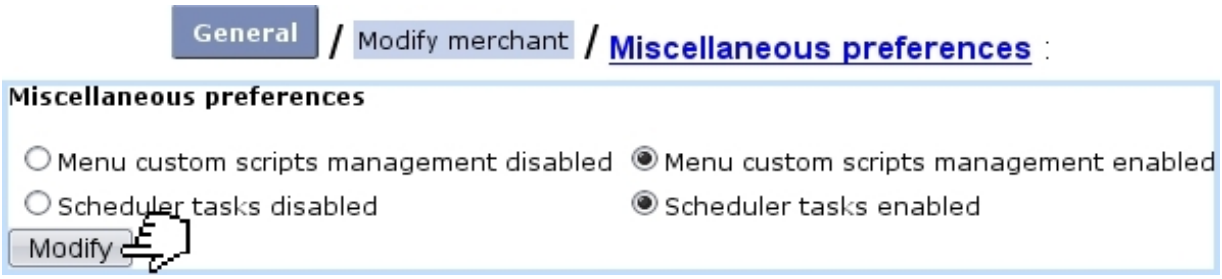


Figure 9.9: Enabling or disabling menu custom scripts and system task managements.

9.1.8 Currencies

For invoices to be created, a currency must be defined as default. Several currencies are supported (US dollar, Euro,...), as displayed at Fig.9.10.

Figure 9.10: Defining the currency on which anything related to prices will rely.

9.1.9 Countries and languages

Countries you wish to accept orders from (i.e., the list of countries available when adding a client, 2.1) are defined here (Fig.9.11). They are assessed the geographical zones which you have previously defined as tax categories (6.3.1).

The default language in which Blue Chameleon is displayed as well as the supported languages are also set at this page. The checked languages will be then available for users on their *Modify User Page* (9.17), where they can make their individual language choice.

9.2 Creating shops

User rights for creating and modifying shop(s) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element

Shop management

A 'shop' is a sale outlet where clients may pick up their order (4.11) ; at least one shop has to be defined for such orders to be processed.

The process to add a new shop start from Merchant / Shops ; there, Add leads to what is shown at Fig.9.12.

The following can be defined :

- a previously-uploaded shop logo picture (9.7.1) ;
- the shop's general information ;

Figure 9.11: Setting countries from which to accept orders and their zone ; setting language in which Blue Chameleon is displayed *by default*.

- a default client for this shop, who will serve later as the Default client as accessed when registering a sale for this shop (4.6.2) ;
- default delivery (4.5.1), payment (6.4.1) and billing (5.4.4) methods.

A shop's data can be modified anytime via Shops / **Shop Name** Modify. At the bottom of this page lies also the list of all cash registers that have been created (see below) for this shop, with for each of them the possibility to check its Balance or to Modify or Remove it.

9.2.1 Creating a cash register for a shop

One or several "cash register(s)" can be added for each shop (9.2) in the way shown at Fig.9.13.

Each cash register is assessed :

- a name ;

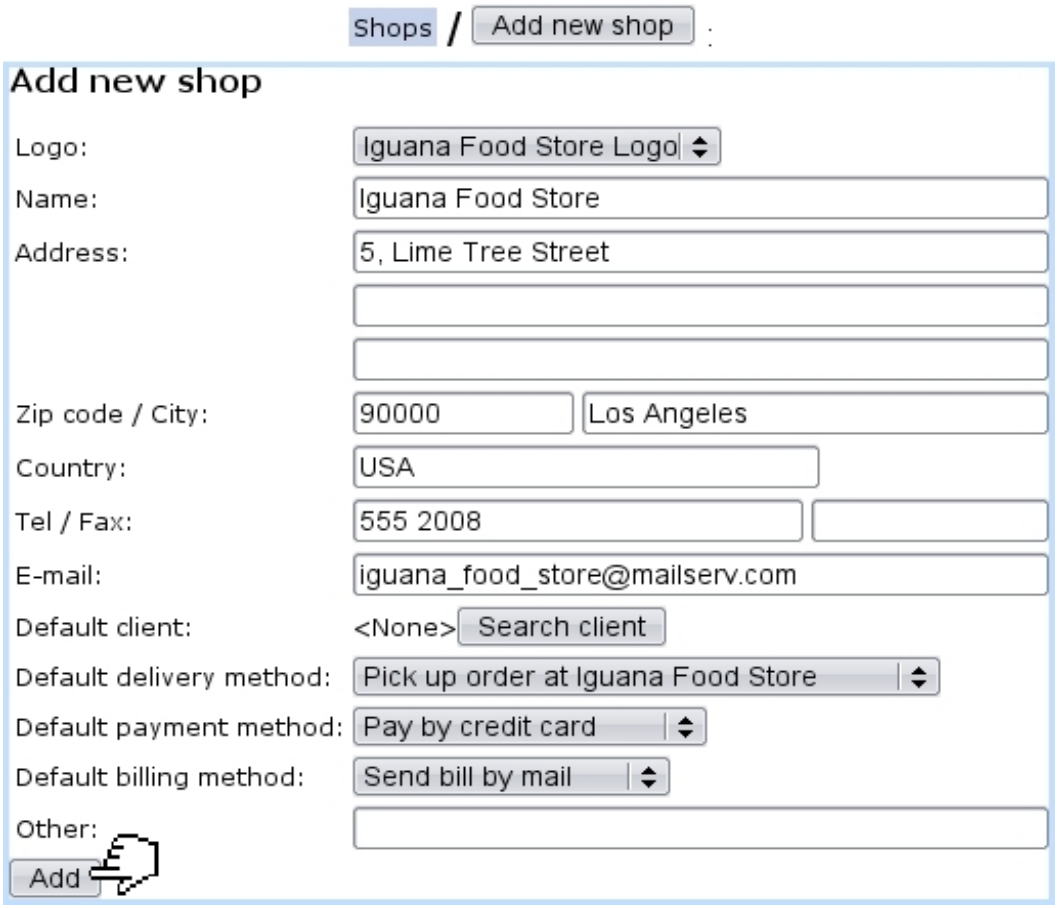


Figure 9.12: Adding a new shop.

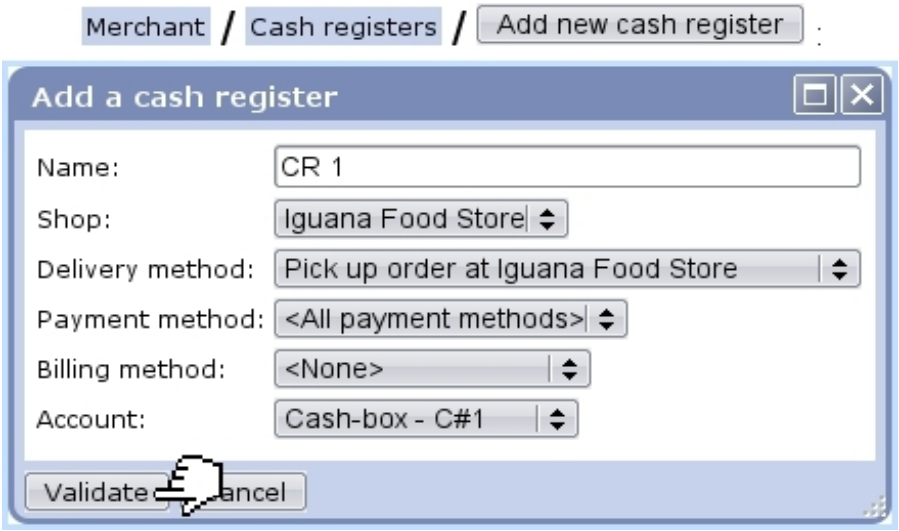


Figure 9.13: Creating a cash register named "CR 1" for shop Iguana Food Store.

- the shop it will be attached to ;
- a particular "pick up order at shop" delivery method (4.5.1) or <None> or <All

pick-up delivery methods> ;

- a particular payment method (6.4.1) or <None> or <All payment methods> ;
- a particular billing method (i.e. invoice delivery method, 5.4.4) or <None> or <All billing methods> ;
- a cash-box account (6.2.3).

A cash register can also be created on the shop's own page, i.e. via Shops / Shop name Modify / Add a cash register.

Once a cash register is created, it becomes possible to register sales (4.6) through it.

9.3 Creating resellers

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

Reseller management

Resellers, only if enabled while at the *Merchant Configuration Page* (9.1.5), are defined via Merchant / Reseller / Add new reseller, as shown in Fig.9.14.

Merchant / Reseller / Add new reseller :

Figure 9.14: Adding a new reseller.

Once created, it is possible to edit a reseller's information via Reseller / Modify.

9.4 User groups and users

The defining of these is better done with your Admin account.

9.4.1 Creating user groups

According to the needs and components of your company, it is possible to define user groups, for instance one for your accounting group, another for your sales group... User groups in themselves do not grant rights, as they are only defined by a user's rights. It is to note that the same user can belong to more than one user group.

To be created, from Users / User groups as shown in Fig.9.15, a user group has to hold at least one user called the default user.

Also, the 'Accessibility:' menu provide the choice to declare this user group as closed or open.

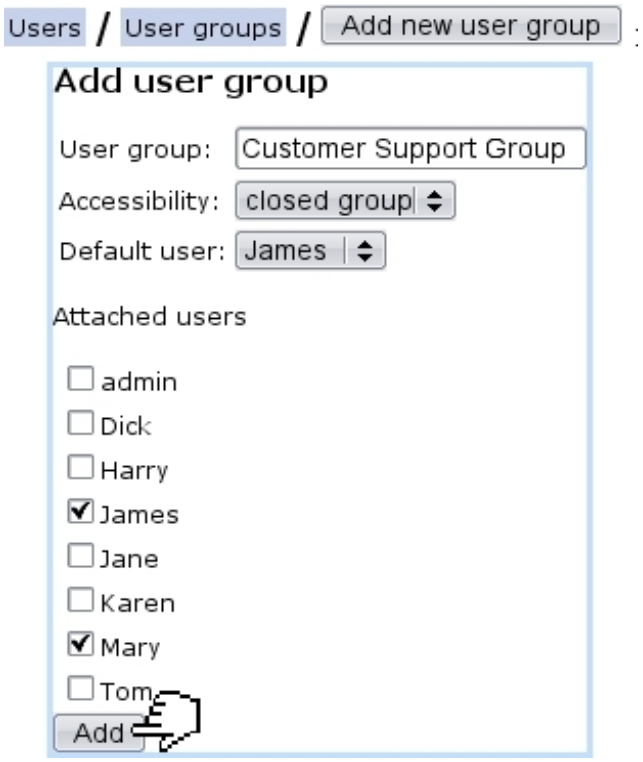


Figure 9.15: Adding the new user group 'Customer Support Group'.

9.4.2 Users

People of your company who are *individually* granted access to Blue Chameleon are called *users* ; each one of them possess a single username and password.

9.4.3 List of users and login information

Fig.9.16 features how the list of Blue Chameleon users is shown.

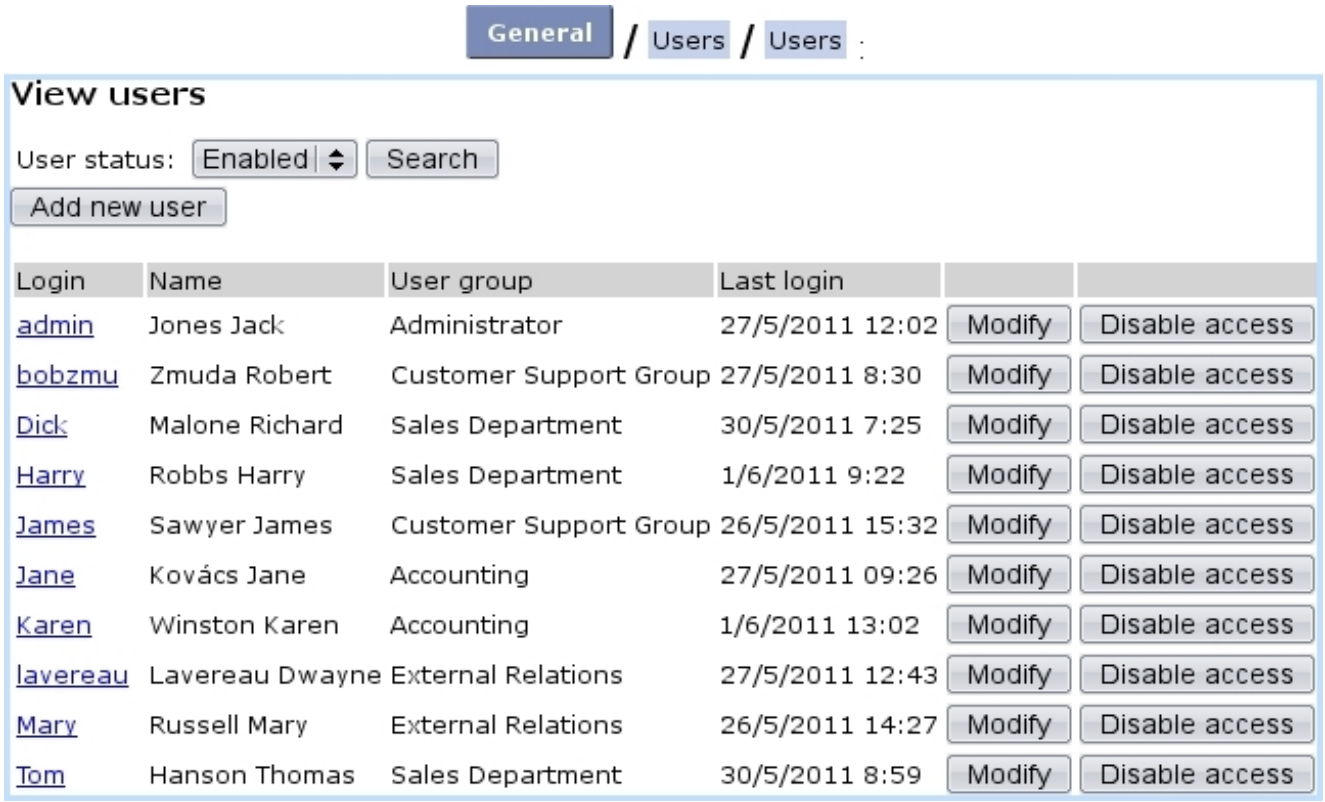


Figure 9.16: The *User List Page*.

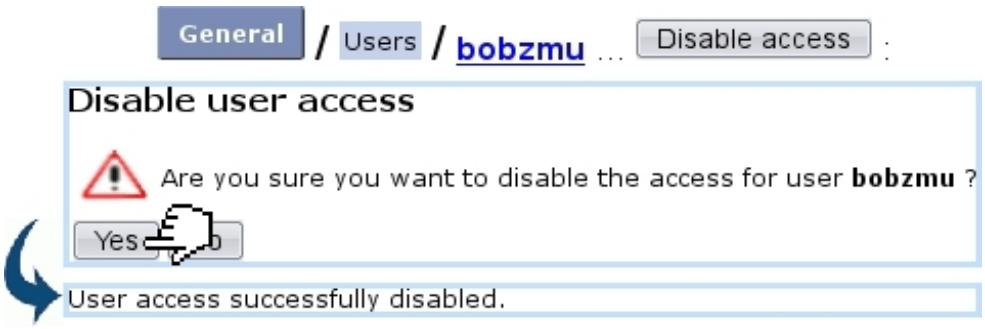
There, a menu provides a specific user status along which to search users : enabled/disabled users, or all of them. Also, it is possible from here to add a new user (9.4.4).

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

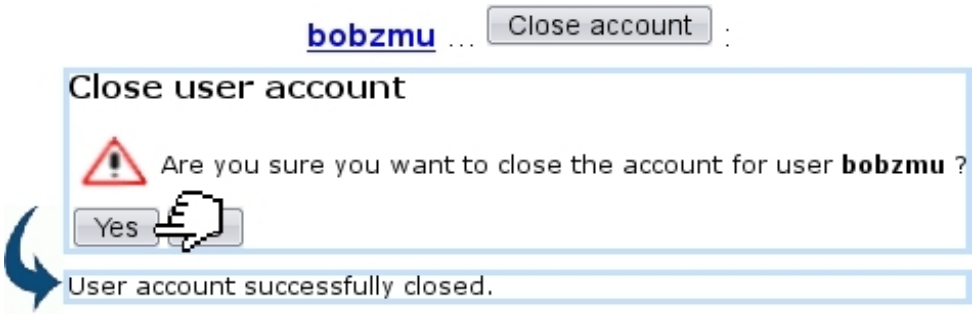
- username, as a click-link to her/his *View User Page* ;
- full name and user group ;
- last login date ;
- a Modify button leading to her/his *Modify User Page* (Fig.9.17) ;
- according to the status of the user, various buttons to perform actions related to user access to Blue Chameleon (9.4.3.1).

9.4.3.1 Disabling access to users, closing their account

A user that has access to Blue Chameleon is said to be enabled ; in that case, as it was seen on Fig.9.16 above, a button to Disable access of user to shop is available, so that if user leaves the company, s/he cannot access Blue Chameleon anymore ; all her/his user rights will be indeed set to 'None'.



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



9.4.4 Creating users

The number of user accounts that can be created depends on your subscription. As a rule, one particular user called 'admin' is already defined by default.

The creation of a user is achieved via the Add new user button as found on the previously-illustrated *User List Page*, leading to a page where user is configured, information- and right- wise. This page is identical to the one detailed below.

9.4.5 Configuring users

User data can be configured during user creation, or afterwards via the Modify button as found on the *User List Page*.

Apart from the user's general information such as user name, password, name, etc., it is possible to define for him/her :

- one or several user group(s) (9.4.1) s/he belongs to ;

- a default user group ;
- a preferred language, chosen from the customized list of Blue Chameleon's supported languages as set at the *Merchant Configuration Page* (9.1.9) ;
- the type of menu (12) as well as its orientation ;
- a default or specific 'cash register transition' account (6.1.1) ;
- if applicable for this user, a supplier (3.6.1.2) and/or a reseller (9.3).

As the list of rights to be set is long and you might no be familiar with all of them, it is advised that you Copy *the rights from admin and after a while, set them individually according to what this user is allowed to do or not (see 11 for greater details about user rights).*
The ability to set a user's rights and manage them is itself ruled under the element :

User management

9.5 Service level agreement (SLA)

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

Credit control and SLA management

A service level agreement (SLA) is a predefined class of service that is attributed to a client, so that clients may be gathered into different groups. Most of them would be labeled, SLA-wise as 'normal', but it is possible to upgrade some very important clients into a distinctive class labelled as 'prioritary', for instance, or 'urgent'.

Service level agreements intervene while dealing with tickets (8.2.1) : there, the 'Priority:' (8.2.5) menu contains all SLAs that have been defined. By default, the one that is preselected is the one that had been assessed to the related client on her/his page (2.2.3).

As illustrated in Fig9.18, a new service level agreement can be added through General / Merchant / Service level agreements / Add new service level agreement.

The SLA level decides how prioritary this service level agreement will be, and thus how high tickets given that priority will appear in the Tickets table (Fig.8.4). For instance, a SLA labelled 'Normal' can be assessed a level of 1, another labelled 'Prioritary' a level of 2, and a 'Urgent' one a level of 3.

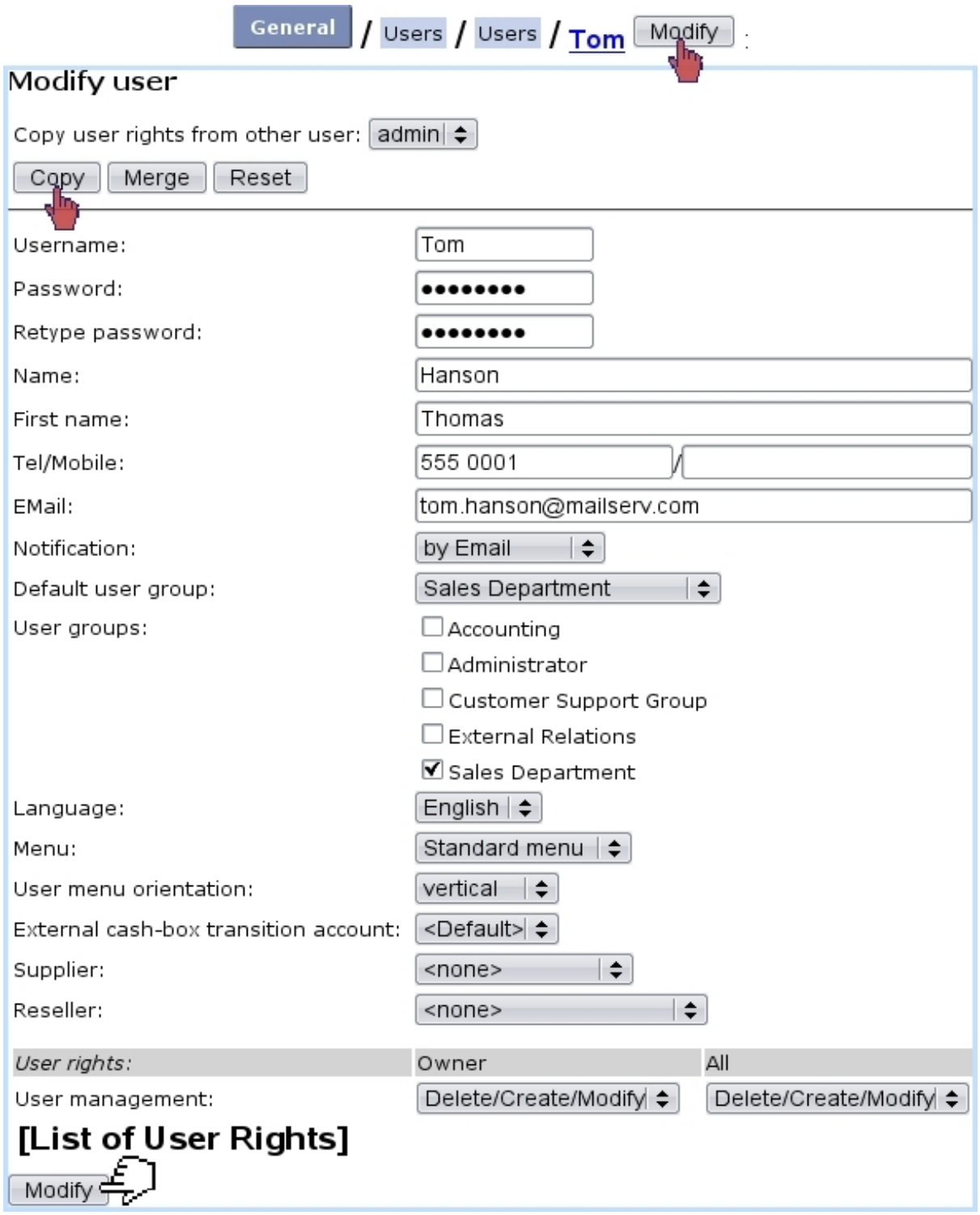


Figure 9.17: Configuring Tom's user account, and assessing his rights temporarily from admin.

The user right level menu as seen on this page relate to the 'Commercial access level:' *as set on the Modify User Page (Fig.9.17) : in order to assess this SLA to a client, her/his commercial access levels will have to be equal or higher than the levels as set while defining the SLA. Therefore, the higher the levels are assessed to the SLA, the more protected it will be : this will for instance prevent too-high statuses and ticket priorities from being given carelessly.*

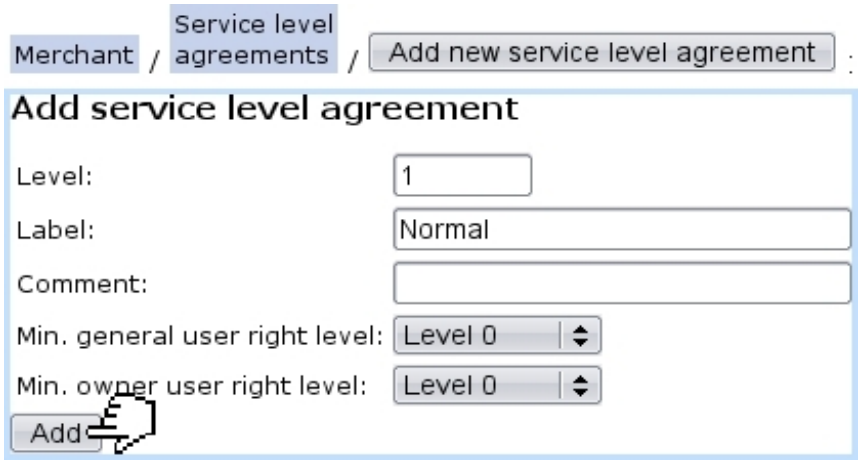


Figure 9.18: Creating a 'Normal' SLA class.

Fig.9.19 thus shows 'Normal', 'Prioritary' and 'Urgent' defined SLAs.

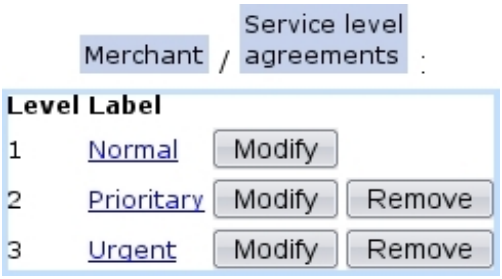


Figure 9.19: 'Normal', 'Prioritary' and 'Urgent' service level agreements have been created and are now available to be assessed to ticket priority.

9.6 Salesperson management

User rights for managing salespersons (adding, commissions,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element

Salesperson management

9.6.1 General managing of salespersons

Mainly appearing as the ones who register an order, 'salespersons' are nonetheless an option, which must be activated (9.7). They are defined through Merchant / Salespersons / Add new salesperson ; there, as shown in Fig.9.20, a new salesperson is assessed :

- a reseller (9.3) ;

- an already existing user (or none) ;
- a status (active/hidden/inactive) ;
- a commission set (9.6.2) (or none) ;
- default or specific 'salesperson' and 'counterpart' external accounts (6.1.1).

Figure 9.20: Adding a new salesperson, who is already a user.

9.6.2 Commissions and commission contracts for salespersons

Inside Blue Chameleon, commissions can be defined for each article and, as illustrated in Fig.9.21, the following data is inputed :

- a commission contract (9.6.2.1) this commission will belong to ;
- a specific article category, or none ;
- a specific article, or all articles ;
- two amounts in shop's currency (9.1.8)corresponding to first and next periods ;
- for subscriptions with consumption (3.7.4), an amount on it and the duration of the commission.

9.6.2.1 Commision contracts

Commissions can be gathered into sets called 'commission contracts', which can be used to particularize the commission of a salesperson (see above). For instance, Fig.9.22 shows the defining of a commission set.

Afterwards, commissions added to this contract/unattached ones can be removed/added by unticking/ticking the checkboxes as seen when modifying this contract :

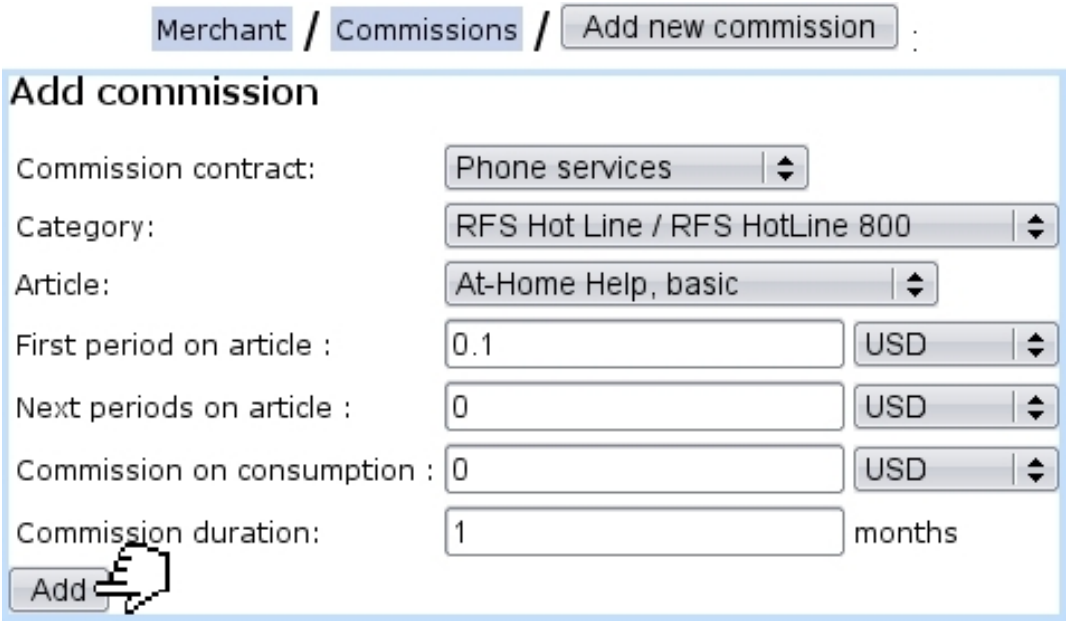


Figure 9.21: Adding a commission for article 'At-Home Help, basic'.

Figure 9.22: Adding a new commission contract.

9.7 Illustrating Blue Chameleon elements with your images

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

Image management

It is possible to render Blue Chameleon visually nicer by uploading images, especially for articles.

9.7.1 Viewing and managing images

Images are generally managed through General / Miscellaneous / Images, where, as shown on Fig.9.23, it is possible to see them according to their context of use and upload some, according to their future use. Indeed, the 'Image type:' menu decides the use this image is aimed at :

- article type (3.1.2.1) and category (3.1.2.2) (which effects can be seen at Fig.4.1) ;
- icon (i.e. for an article, which can also be uploaded on the *Modify Article Page*, see below) ;
- merchant and shop logos, as chosen afterwards on their dedicated pages (9.1.1 and 9.2).

Thanks to the 'Width:' and 'Height:' fields (in pixels), it is possible to resize the image. If they are set to 0 or left blank, image will be displayed in its original size.

Once uploaded, images can be viewed via Images / View images, where it is also possible to Modify (i.e. change their width, height and description) or Remove them.

9.7.2 Adding an article image

Amongst all elements that can be assessed a picture, articles provide the possibility to upload directly an image on their very page, as featured on Fig.9.24, while creating (3.1.1) or modifying (3.2.1.1) an article, thanks to the Add image or Add icon buttons. Then, for instance on the *Article Management Page* (3.2.1) or when ordering this article, the icon or image will be displayed.

It can be noted that, for the same article, several images or icons can be uploaded ; then, on the *Modify Article Page*, drop-down menus for icon and image will let you select the one(s) you wish.

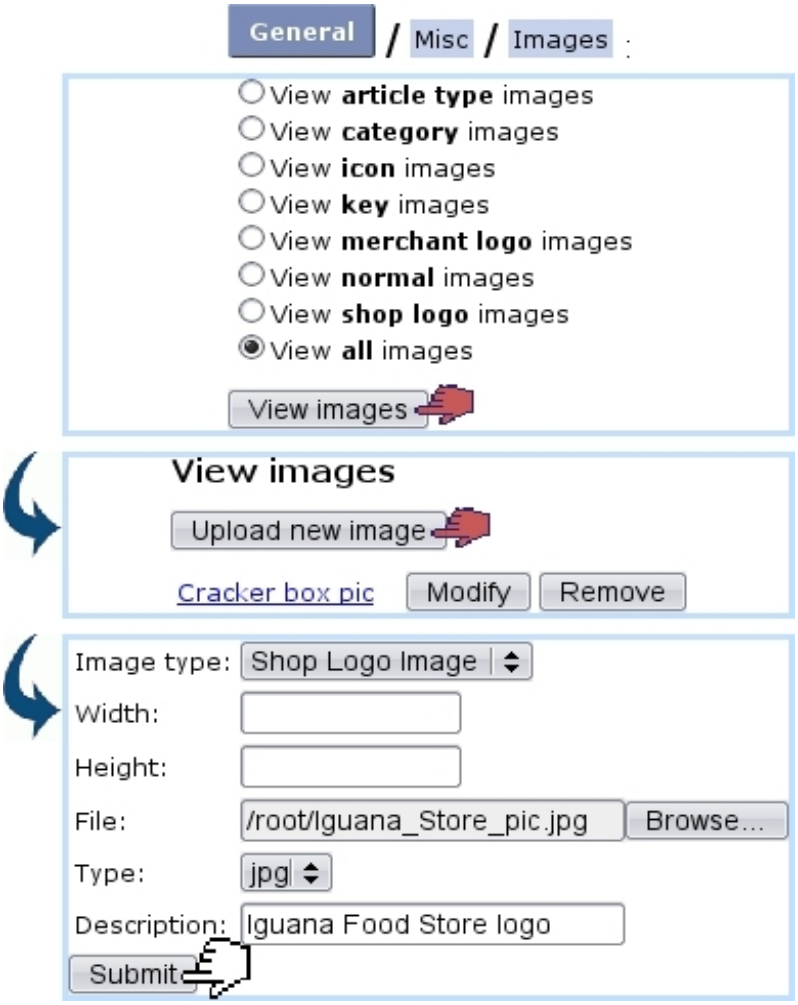


Figure 9.23: Viewing current images and uploading one to be used in this example as a Shop logo.

The difference between the icon and image if that, if both are defined, it is the icon picture that will be displayed. If just one of them is defined (or the other set to 'none' on its menu) then it will be displayed, whether icon or image.

9.8 System task management

User rights for managing system tasks (handling, closing, scheduling,...) can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element

Task management

Through use of Blue Chameleon, actions called system tasks are sometimes triggered, for instance :

- scheduler task (9.8.2)

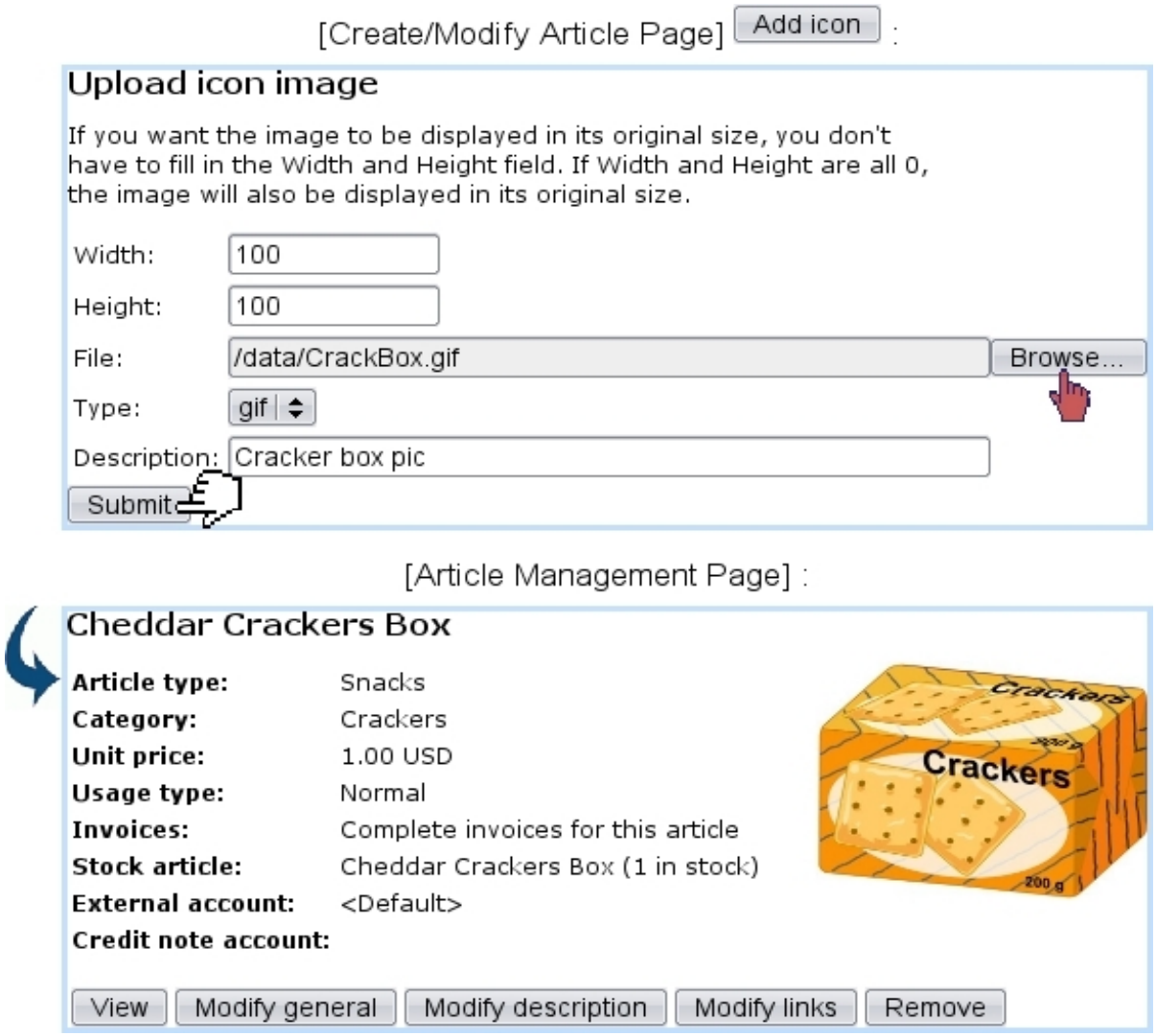


Figure 9.24: Adding an icon for an article.

- export to external system (6.1.2)
- export problem report (6.1.2.1)
- validation of temporary invoices (3.7.2.2)
- calculation of outstanding amounts (5.6.6.2)
- reading of a domiciliation return file (5.10.7)
- sending of a print set (5.5.5)
- filling of a domiciliation batch (5.10.6.1)

They are displayed on the "Task Manager" event control (provided that it had been enabled, 1.3) as illustrated as on example on Fig.9.25 ; for each of them, the date and time at which they have been launched is shown, as well as, when achieved, the date at

which they have ended. Also, a percentage shows the progress of the system task, and if applicable, it can be clicked on to show its details.

For details to be accessed and, more generally, to manage system tasks, the 'Scheduler tasks' must be enabled while at the *Merchant Configuration Page* (9.1.7).

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

Once achieved, while on its details page, it is possible to Close the system task to remove it from the event control.

9.8.1 Executed system tasks

Whether system tasks have been started, have finished or have been closed, the list of them is accessible through General / Personalization / Task management / Executed tasks, where, as displayed in Fig.9.26, menus allow to refine search by system task type and status.

Similarly as for the "Task Manager" event control (Fig.9.25), clicking on a system task name allows to access its details and, if finished, to close it.

9.8.2 Scheduler tasks

The above concerns system tasks that are launched punctually by a user ; Blue Chameleon also allows particular scripts to be automatically executed at set times and dates and with

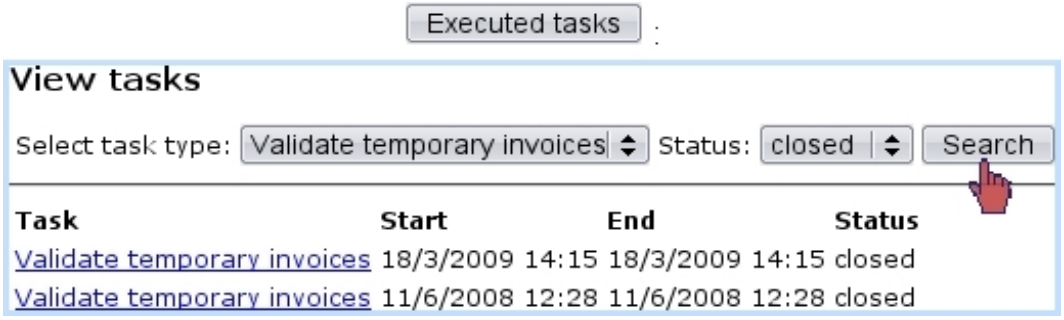


Figure 9.26: Viewing system tasks pertaining to temporary invoice validating that have been closed.

a defined frequency or none.

The management of these scheduler tasks is done, as illustrated in Fig.9.27, via a weekly calendar accessed through General / Personalization / Task management / Task scheduler.

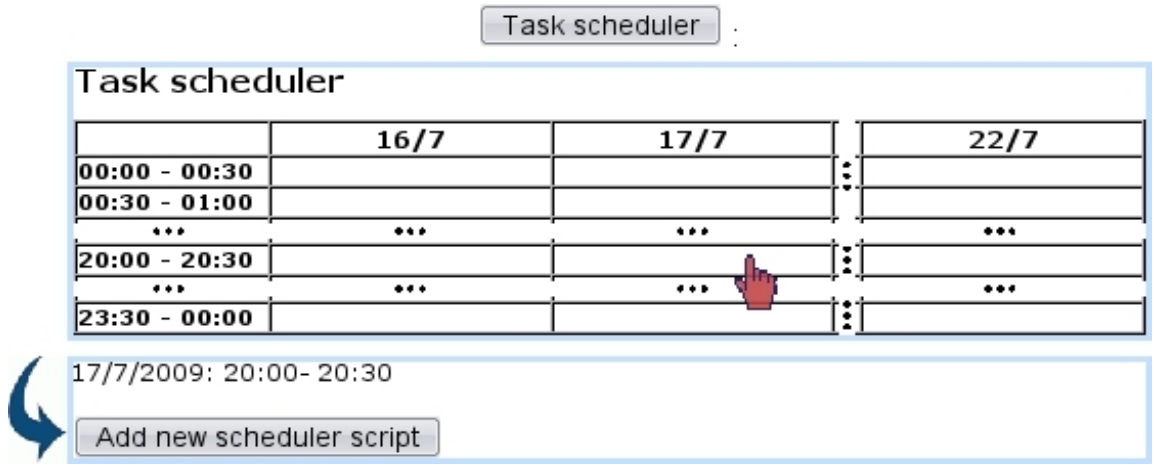


Figure 9.27: Selecting a day and a time interval to schedule tasks.

After having selected the right day and time interval, it becomes possible to Add new scheduler script as shown on Fig.9.28.

Once added, a scheduler script is displayed in the scheduler calendar ; as shown on Fig.9.29, upon click, it is possible to check every detail of it and if needed Modify it, as well as executing it thanks to the eponymous button.

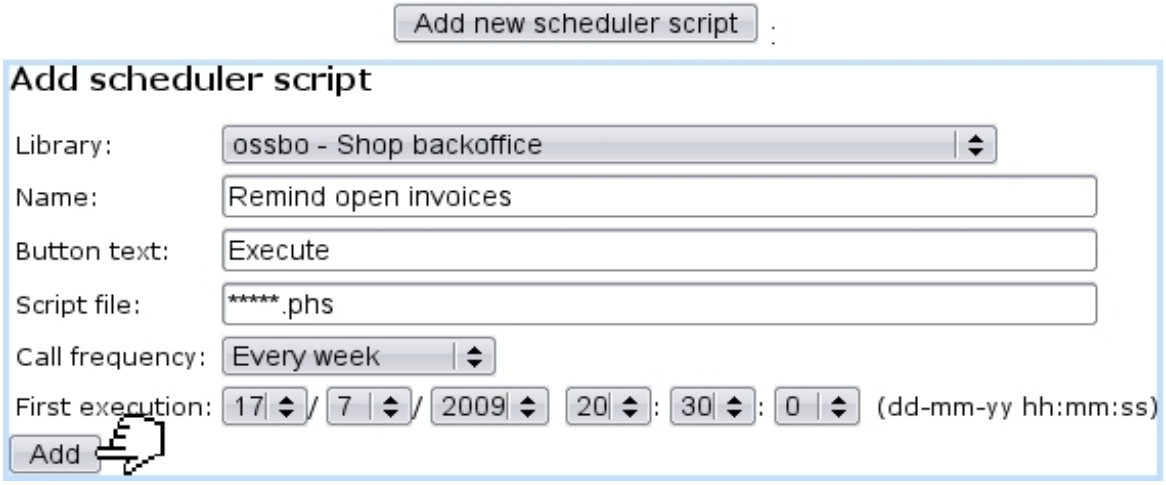


Figure 9.28: Building a scheduler task that consists in weekly calling in the script to remind open invoices.

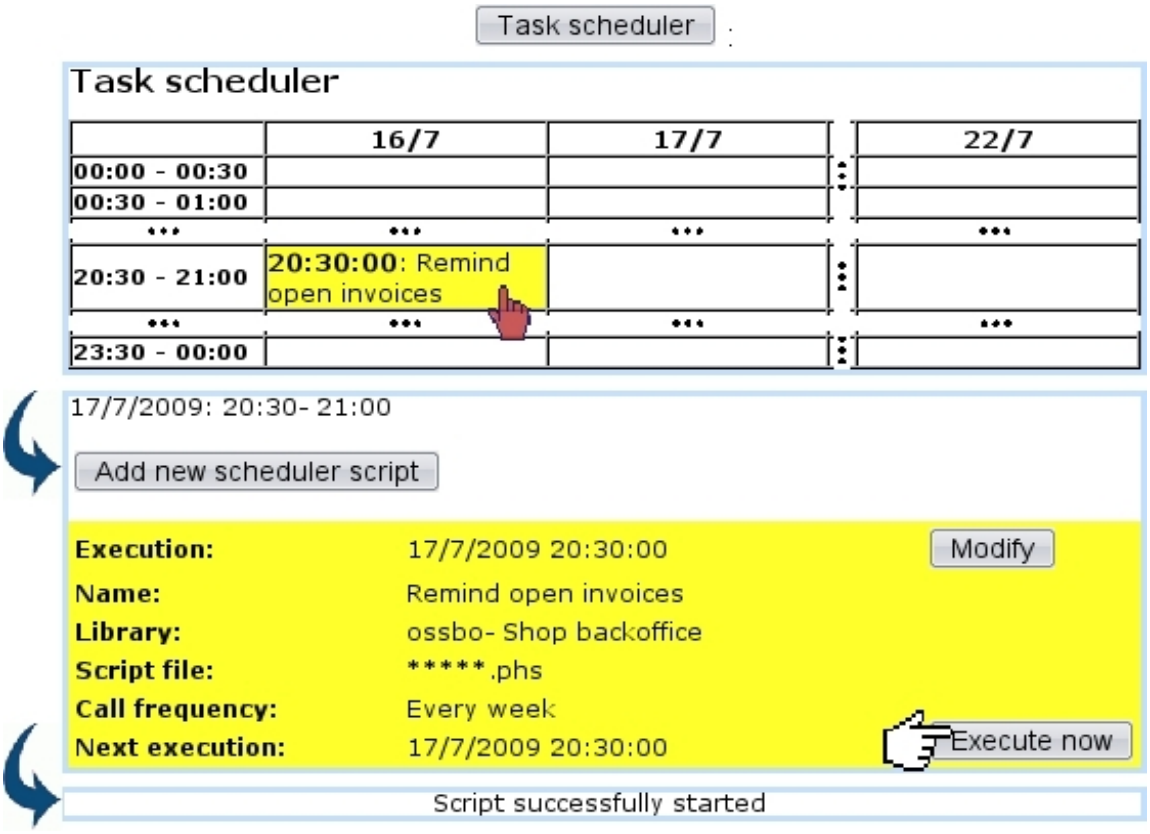


Figure 9.29: Launching the (weekly) execution of a scheduler script.