

BLUE CHAMELEON : Order Management

For links outside this document,

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

December 19, 2013

Chapter 4

Order Management

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



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

Order management

4.1 Making an order

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



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

4.1.1 Choosing articles and filling-up the shopping cart

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

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

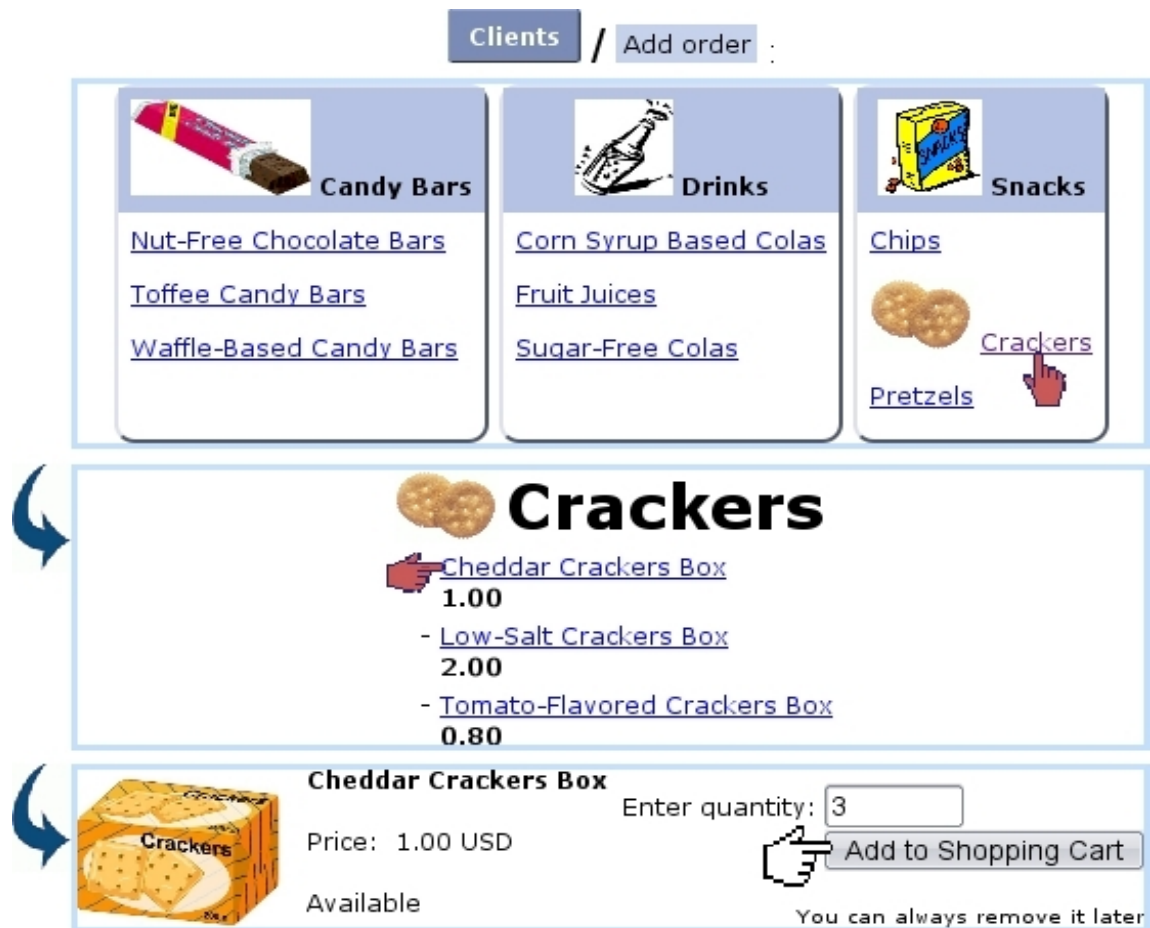


Figure 4.1: Preparing an order of 3 *Cheddar Crackers Boxes*.

This choosing process is summed up on Fig.4.1.

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

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

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



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



Making ordering easier

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

4.1.2 The *Make Order Page*

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

[Proceed to checkout](#) /

[Client Search] **Smith John** :

[Proceed with next step](#) :

Make order

Order date: - -

Salesperson:

Title :

Name * :

First name :

Address :

Zip code * / City :

Country * :

Phone / Office :

Mobile / Fax :

E-mail :

Username :

(*) required

Delivery method:

Payment method:

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

Invoice delivery method:

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

Make order

Order date: 29/5/2010

Salesman: Dick

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

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

Delivery method: Pick up order at shop

Payment method: Pay by credit card

Invoice to:

Invoice delivery method:

Send confirmation email to client

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

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

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

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



Successful order registering requires :

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

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

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

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

Make order :

The order has been successfully registered.

Reference: [Order #2010052901001](#)

3 Cheddar Crackers Box 1.00 **Supply**

New order **Client management** **Main menu**

Figure 4.4: Screen confirming that order has been registered.

4.1.3 Gift wrapping

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

Delivery method: **Secured mail**

Gift wrapping

Text to add to the order

Happy Birthday !

4.1.4 Adding an order attribute



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

Order attribute management

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

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

Add order attribute

Attribute type: REFERENCE

In client shop: Yes No

Optional: Yes No

Validation script: --- None ---

Language **English**:

Attribute name: Comment

...

Add

[Make Order Page]

Make order

Order date: 28 - 1 - 2011

Comment * : client's 1st order

Salesperson: Dick

...

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

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

4.1.5 Order statuses

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

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

4.1.6 The order number

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

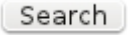
4.2 Searching orders

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

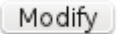
On subsequent page, as shows Fig.4.6, various search criteria can be inputed :

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

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

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

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

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

Orders :

Search orders

Numbers: Status: Registered by:

Article: Salesperson:

Category: Display:

1 order found


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

Figure 4.6: An example of order search.

4.3 The *Order Details Page*

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

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



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

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

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

[2010052901001](#) :

Order details

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

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

Total (USD) 3.00 (VAT incl.)

Figure 4.7: The *Order Details Page*.

4.4 Order follow-up

All operations related to order management are described below.

4.4.1 Modifying an order

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

4.4.2 Canceling an order

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

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

Modify order


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

(*) Choose 0 as quantity to delete an article from the order

Choose an article to add to order:

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

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

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

Reason:

Cancel the following invoices:

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

4.4.3 Supplying items



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

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

[Successful Order Screen or Order Details Page] :

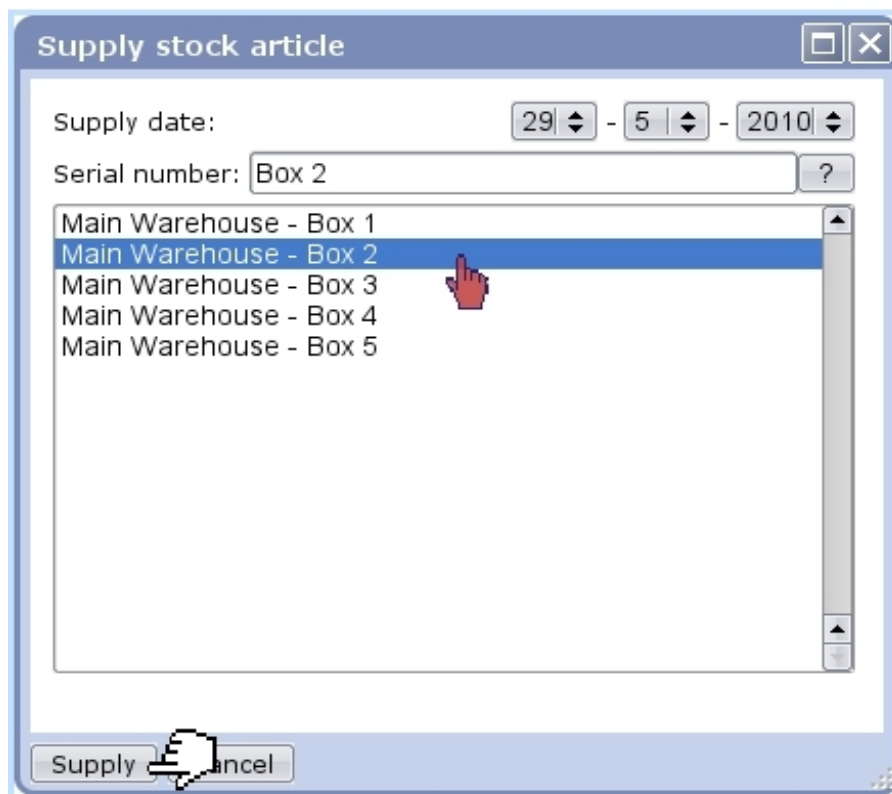


Figure 4.9: Picking stock items from their location to fulfill the order.

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

2010052901001 :

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

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

4.5 Article delivery management



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

Delivery management

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

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

Delivery methods for invoices and reminders are explained at 5.4.4.

4.5.1 Managing article delivery methods

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

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

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

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

Add delivery method

Leave out a text field to choose the default label.

Delivery type:

Delivery costs:

Language **English**:

Delivery method label:

Description:

...

Status:

External account:

Credit note account:

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

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

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

4.5.1.1 Delivery costs

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

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

Add new article delivery method :

Delivery type:

Delivery costs:

Language **English**:

Delivery method label:

Description:

...

Modify delivery cost list

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

Number to add:

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

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

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

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

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

As Fig.4.13 shows :

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

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

[Add new article delivery method](#) :

Delivery type:

Delivery costs:

Language **English**:

Delivery method label:

Description:

...

Number to add:

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

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

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

View delivery method

Delivery Type: Deliver order by mail

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

Language English:

Delivery method label: VERY Secured mail

Description: For very special orders.

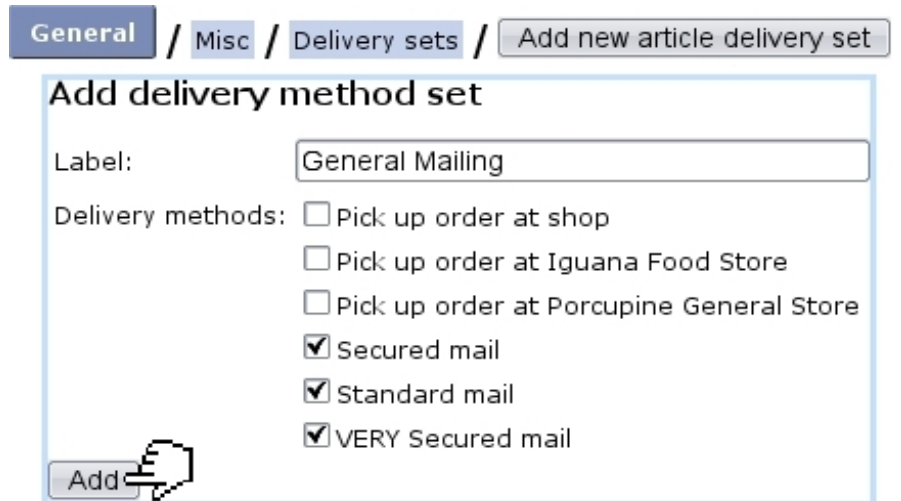
Figure 4.14: The cost details for 'VERY Secured mail' article delivery method.

4.5.2 Creating and modifying delivery methods sets

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

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

An example is displayed at Fig.4.15.



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

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

4.6 Using the cash register

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

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

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

4.6.1 Selecting an article

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

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

Iguana Food Store - CR 1

Article Add Search article Article return

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

Figure 4.16: The *Shop Sale Page*.

If article is stock-supported (3.3.4.3) :

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

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

Serial number: Select

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

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

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

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

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

[Shop Sale Page] Search article :

Search article

Search articles

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

Article	Category	Price
6-Pack	Sodas	3.00 USD

Sale

Salesperson:

Delivery

Delivery method:

Payment

Payment method:

Invoicing

Invoice delivery method:

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

Figure 4.17: Selecting an article for a shop sale.

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

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

Figure 4.18: Selecting a client for a shop sale.

4.6.2 Selecting a client

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

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

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

4.6.3 Concluding the sale

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

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

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


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

Figure 4.19: Concluding the sale by registering payment.

4.6.4 Returning an item

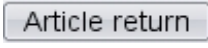


Returning an item from the Cash register requires physical stock management to be enabled while at the Merchant Configuration Page (9.1.4) and also unrestricted user rights for 'Stock management' (11.2).

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

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

There :

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

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

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

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

Search article □ ×

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

Serial number:

List:

- Type 240-0

Article return

Order

[Order details] [Client details]

Article	Qty	Unit price	Total VAT	Status	Salesperson
Gizmo	1	60.00	60.00 (6.00% VAT incl.)	Ordered	<take from order>

Total (USD) 60.00 (VAT incl.)

Return


New location:

Article status:

Reason to return article:

Exchange

New article:



Article successfully returned into stock

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

4.7 Sales Statistics



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

Sales management

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

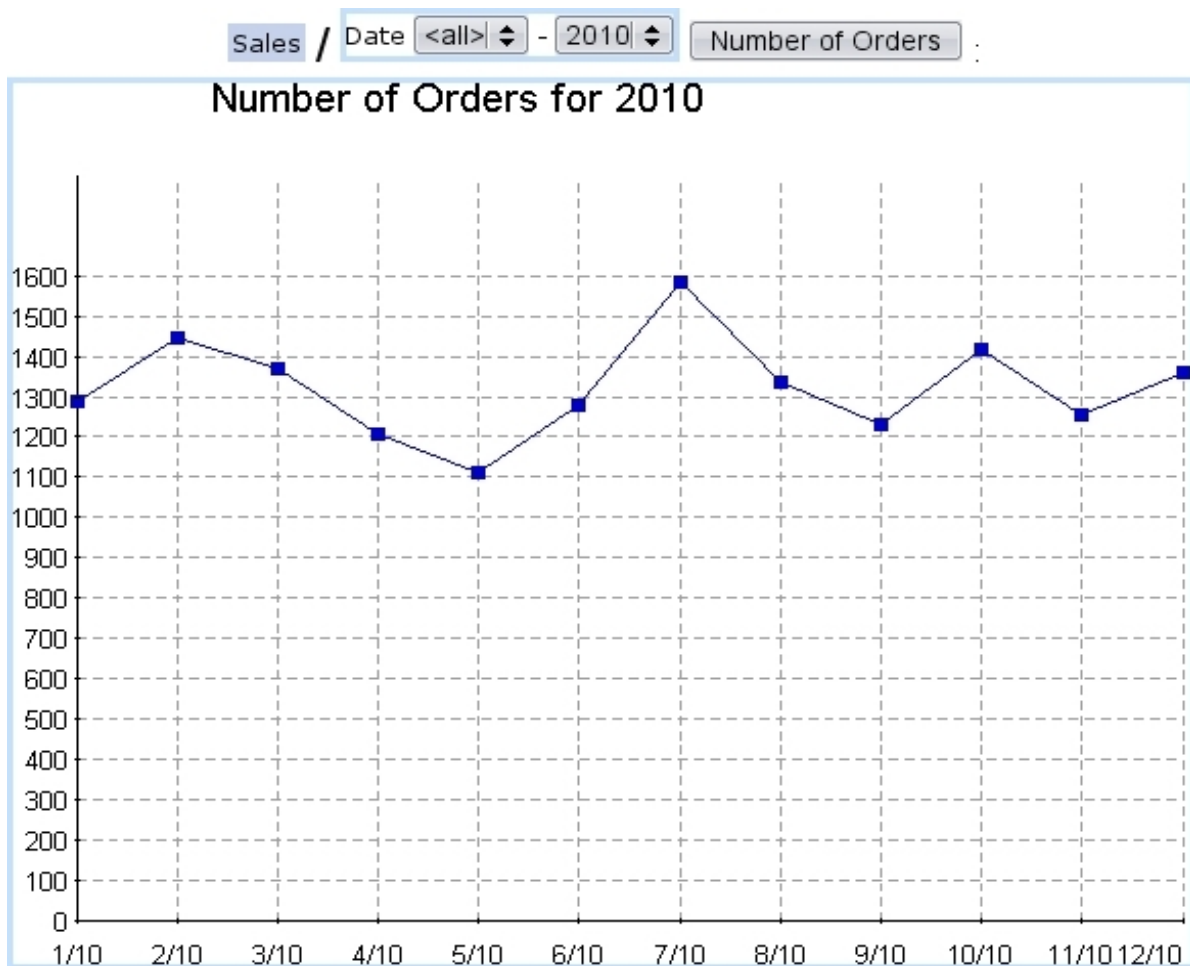


Figure 4.21: Graph showing an example of order evolution, during one year.

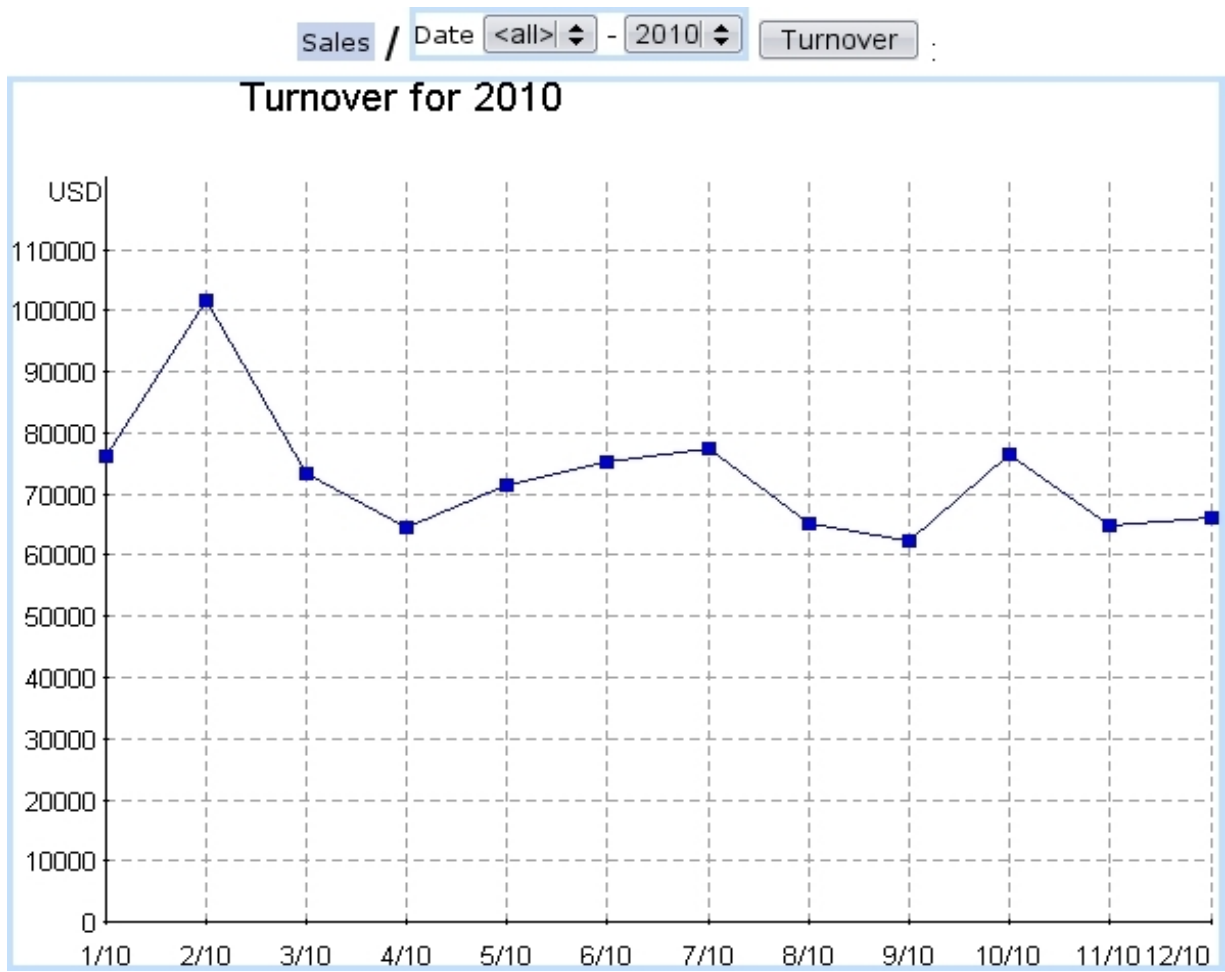


Figure 4.22: Graph showing an example of turnover evolution, during one year.

Sales / Date <all> - 2010 Overview

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

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

Sales / Date <all> - 2010 Details

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

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