

BLUE CHAMELEON : Setup Guide

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Chapter 0

Blue Chameleon Setup Guide

1. *Merchant creation and quick configuration :*

- (a) Fill in your company's general information (9.1.1) ;
- (b) Settings to do :
 - i. set Default User Group as Administrator (9.1.1) ;
 - ii. set Suppliers as enabled, if you wish to include them (9.6) ;
 - iii. set credit control as enabled (9.8) ;
 - iv. define supported currencies (9.10) ;
- (c) Shop(s) creation (9.2) ;
- (d) User groups creation (9.4.1) ;
- (e) Admin- and user(s)- related setups (9.4.2) :
 - i. fill in their general information ;
 - ii. copy user(s) rights from admin ;
- (f) Define service level agreements (9.5).

If you wish to use stock management :
Set Stock Management as Physical (9.6)

If you wish to manage some articles as subscriptions :
Set Article Subscriptions as enabled (9.6)

If you wish to manage salespersons :
Set Salespersons as enabled (9.1.5)

If you wish to use the External System :
Set External Account Management as either 'manual export' or 'automatic export' (9.8)

2. *Invoicing, accounting and payment setups :*

- (a) Define a credit control class (5.6.6.1) ;
- (b) External accounts creation (6.1.1) ;
- (c) Bank accounts creation (6.2.1) ;
- (d) Credit note accounts creation (6.2.2) ;
- (e) Cash-box accounts creation (6.2.3) ;
- (f) Tax categories creation (6.3.1), and then assessing them to 'Countries where order are accepted from' (9.1.9) ;
- (g) Tax codes creation (6.3.2) ;
- (h) Article delivery methods creation (4.5.1) ;
- (i) Invoice (and, if needed, reminder) delivery methods creation (5.4.4) ;
- (j) Payment methods creation (6.4.1) ;
- (k) Assigning supported delivery methods to payment methods (6.4.1.1).

3. *Main databases creation :*

- (a) Clients creation (2.1) ;
- (b) Articles creation (3.1.1).

If you wish to use stock management :

- (a) Stock locations creation (3.6.1.1) ;
- (b) Suppliers creation (3.6.1.2) (if you wish to include them) ;
- (c) Stock categories and articles creation (3.6.1.3 and 3.6.1.4) ;
- (d) As pictured as an example in Fig.3.10, for the relevant categories, pick either 'optional/required stock delivery' and also associate them with the corresponding stock categories ; then, for the relevant articles, associate them with the corresponding stock articles.

If you wish to manage some articles as subscriptions :
Subscription articles creation (3.7.1.1)

If you wish to manage salespersons :
Salespersons creation (9.6.1)

4. *Non-prioritary elements* :

- (a) Defining work sets for invoices and reminders (5.5.2.1) ;
- (b) News rights setup (7.1.1) ;
- (c) Agenda general setup (7.2.1) ;
- (d) Helpdesk general setup (8.1) ;
- (e) User rights regulation (*Advanced Functions and Configuring*,11).

If you use Online General Accounting add-on :

- (a) follow the "First time using OGA" guideline (6.5.2) ;
- (b) creation of OGA accounts (6.5.3.1), (if you plan on using exporting functions) accordingly to already-existing external accounts (6.1.1) ;
- (c) set OGA access to user(s) (6.5.1.1), then set her/his/their rights on accounts (6.5.1.2).

If you use Customer Relationship Manager add-on :

print templates definition (*Advanced Functions and Configuring*,13.2)

If you use Human Resource Manager add-on :

HRM general setup (7.11.1)