



## Blue Chameleon FAQ

*For links outside this FAQ, check the relevant part in  
**Blue Chameleon Full Documentation.***



December 19, 2013

# Appendix E

## Frequently Asked Questions

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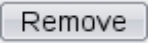
### **E.2.1 Blue Chameleon's general interface**

### **E.2.2 Client Management**

1. *Why adding a username and password while creating a new client ?*
2. *How can I update a client's address/phone number/email ?*

Updating a client's general information can be done anytime through the  button as found after a client search (2.2). There, on the *Modify Client Page* (very similar to this client's creation one), it becomes possible to edit any information you want.

3. *How can I delete a client ?*

Deleting a client is done via the  button, once again found next to a client's name after a client search.

4. *Where can I register a prospect ?*

Prospects, that is to say people that may become clients in the future, are only dealt with through the Customer Relationship Manager add-on (7.9).

5. *What is the utility of "Transfer to other client" ?*

It may happen that one client would make an order for the another (for instance if those two clients are family-related) ; the former's client data might be not necessarily needed in the future.

Therefore, transferring the former client to the latter also enables to transfer already-made orders, thus avoiding to cancel those orders on the one hand and re-creating them on the other.

6. *A client I just registered does not appear through a client search : why ?*

It is because this client is not 'active' yet, that is, s/he has made no order and has no invoice yet. On the *Client Search Page*, be sure to select in the 'Clients:' menu the option 'All', as 'Clients with order or invoice only' is always the default option.

7. *How can I add a specific description for a particular client ?*

While at the *Modify Client Page* as evoked in *How can I update a client's address/phone number/email ?*, there is a 'Comment:' text field that allows you to enter anything pertaining to this particular client.

This can be used as a reminder of specifics things to remember or know about this client, especially for new users that are not yet accustomed to the details of your client database.

8. *I tried to delete a client, but it is impossible, it says "Client cannot be deleted because it is referenced !" ; what to do ?*

As a measure of safety inside Blue Chameleon, a client cannot be deleted if there are still invoices, orders,... at her/his name : this way, no data can be lost.



## E.2.3 Article Management

### E.2.3.1 On article creation/modifying

1. *Are article types and categories mandatory ? Can't I just create articles ?*

Article types and categories are just here to enable structured classification ; on the other hand, it is indeed possible to create articles without the two, as Blue Chameleon has pre-defined a 'default article type' and a 'default category'.

2. *What are exactly these 'order in front/back-office' options ?*

The article you are currently creating may or may not be ordered in front office (i.e. by retail sale) and/or in back-office (i.e. by online or mail orders) ; choose then the right option.

3. *What could be the use of the 'Edit on order' options ?*

When passing an order, you may want that the article name and, most of all, its price are not to be modified : the 'Edit on order' menu then provides the 'Not editable' option so that none of them can be edited. One other choice is 'Edit article label', allowing to change if needed the name of the article as it appears on the order form.

Finally, 'Edit article price and label' permits them to be both modified ; this could be useful for instance in case a price increase or decrease has not been applied yet on the article's description.

### E.2.3.2 On category creation/modifying

1. *Why different levels of back-office ?*

Those different levels are met on the 'Article ordering level:' menu while creating (3.1.2.2) or modifying (3.2.2.1) a category. They correlate with a similar menu on the *Modify User Page* and can be set as described in 3.3.4.2.1.

The role of this multitude of levels is to enable a real gradual classification of (articles related to) categories according their criticality and the importance of the user.

2. *What do the different 'Article presentation' options give ?*

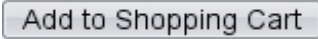
The 'Article presentation' menu deals with the way the articles belonging to this category are presented just after selecting this category while ordering :

- Picking 'single article' present these as a short list, just featuring their name and price ;

- 'all articles condensed' does the same, along now with a quantity-to-order field ;
- 'all articles detailed' features everything of the latter, plus the current article status and the corresponding article icon, if any.

### 3. *What do the different 'Article ordering' options give ?*

The 'Article ordering' menu rules the way the order is done on articles of this category :

- they are for instance ordered 'without cart', that is to say, the only choice left when adding an article (by unit or by a certain quantity, all ruled by 'Article presentation' above) will be making the order (i.e. searching for the ordering client), *not* adding another article ;
- the two other options deal with adding single or multiple articles per page to cart. The latter only applies when 'Article presentation' is set to 'all articles detailed/condensed'. Then, the choice of 'single...' will make appear an  button for the single/every (according to article presentation) article while the choice of 'multiple' will make appear this button once, which is clicked as a conclusion after inputting various quantities of that category's articles.

### 4. *What is the best choice in 'Quantity to add to shopping cart' ?*

This menu deals with the way an article appears on the order form if several copies of it are ordered :

- First, 'single occurrence with a quantity of 1' simply forbids to add another copy of this article when it has already been ordered : this can be chosen for **categories whose articles are ordered *only once* by order** ;
- then, 'single occurrence with a variable quantity' ensures that, no matter how an article belonging to that category is ordered (for instance, 3 copies are put to cart, then 6, then 1), this article will always appear once in the order form, along with the corresponding quantity (in this example, 10). This choice is advised for **categories whose articles that are prone to be ordered in large quantities** ;
- finally, 'multiple occurrences with a quantity of 1' will display this article on the order form each time it has been added to the cart. This might be the choice for **categories whose articles that, though not to be strictly ordered once, will not be ordered in large quantities neither**.

### 5. *What is the best choice in 'Stock support' ?*

It all depends on which level you want to manage stocks. If if you are not interested in stock-managing the articles belonging to this category, then pick 'no support'.

All three other options handle stocks differently :

- 'stock counter' is the choice if articles belonging to this category will not have serial numbers inputed, or if you do not want to input them ;
- 'optional stock delivery' fits if articles have serial numbers which are not known in advance ;
- 'required stock delivery' is finally the option to choose if you want to manage your stocks precisely by serial numbers, in a mandatory way Indeed, right after an order is completed, Blue Chameleon provides the  as a reminder to supply the ordered articles :



6. *What are the use of the 'Client to invoice ordered articles' options ?*

7. *Why assessing delivery and payment methods sets ?*

Delivery and payment method sets are used to gather delivery and payment methods with common features ; while creating/modifying a category, this rules the delivery and payment methods which will appear on the *Make Order Page*.

For instance, if a category holds articles that are to be picked up at shops only, it will prevent possible mistakes to assess this category a delivery method set that contains every pick-up-at-shop delivery method.

### **E.2.3.3 On stock management**

1. *Is stock management mandatory to use ?*

Of course not. If you wish to use only Blue Chameleon article management features without stock management, it is advised that you select 'disabled' for the 'Stock management' menu in the Merchant Configuration (9.1.4).

2. *Stock support can be defined with either article type or category ; which one overrides the other ?*

It is always what has been chosen for category that ultimately decides for the stock support of an article.

3. *Can I directly export my article database to create my stock article database ?*

[In Development]

4. *Is there an automatic way to input serial numbers ?*

[In Development]

5. *Is it possible to register the entry of a large quantity of items without entering serial numbers ?*

[In Development]

6. *Can I register a stock entry without a supplier document ?*

Of course, as  is clicked on, the 'Document:' menu provides the option 'without document' as default. Then, clicking on  will lead you to the supplying process without the hassle of defining a supplier document.

7. *While registering a supplier document, a particular supplier does not appear in the menu. Why ?*

For a supplier to appear in this menu, at least one stock article must have been defined with this supplier, as chosen under 'Supplier and purchase price' on the *Add Stock Article Page*.

#### **E.2.3.4 On stock subscription management**

1. *A client does not need to use her/his subscription during an indefinite amount of time ; what is the best to do ?*

In this case, the best thing to do is suspending the subscription through  as available on the corresponding *View Subscription Page* (3.7.1.5). The start date can be arranged as needed. The day client decides that s/he needs access to her/his subscription again, it will be reactivated through , starting that very day.

2. *What if the time during which the subscription will not be used is precisely known ?*

Like before, the subscription is suspended in the same way. But now, the re-activation can be scheduled for the date on which it will be needed again, and this delayed reactivation can be done just after the suspend, so that it will not be forgotten.

3. *How to start a subscription for which no payment has still been registered ?*

The possibility to start or not an yet unpaid subscription is ruled by the 'Order subscription in advance first' tick box as available while at the subscription creation page : tick it if you are sure that there is no risk to start subscription whereas payment may have not been received, or if payment method is naturally prone to delays.

4. *A subscription has been blocked or suspended by accident ; how can I solve this ?*

In these two cases only, it is possible to re-activate this subscription through . In the case of a accidental subscription block, client is charged despite not having access to the service : so it is fair to postpone the subscription end date through the  button (always at this *View Subscription Page*), adding the same number of extra days that client has been deprived of.

5. *What can subscription sets be used for ?*

Subscription sets are useful to gather subscriptions according to certain criteria. Blue Chameleon's subscription system indeed provides a subscription search tool (3.51) that allows to perform searches cumulating various criteria such as, for instance, the issued date (through the related order number, 4.1.6) and the status.

The list of subscriptions returned by this search can then be put into a set (3.7.3.3).

For example, one could create a 'Suspended subscriptions, current year' that could be filled by using this status and the current year as the search criteria.

6. *I have subscriptions for services that don't include any consumption ; does Blue Chameleon handle this ?*

These 'basic', consumption-less subscriptions are simply defined as such during their creation, by picking 'Subscription' in the 'Usage type:' menu.

7. *On the contrary, my subscriptions have to be invoiced according to how much the clients used it : is this also handled by Blue Chameleon ?*

Indeed, this time the choice for 'Usage type:' can either be 'Subscription with variable consumption' or 'Variable consumption only', depending on whether the subscription to create has a fixed cost or not.

## E.2.4 Order Management

1. *An article that I want to make an order on is not displayed at the Order page. Why ?*

Go to the *Modify Article Page* for this specific article and select for 'Order article:' either 'order in back-office only' or 'order in front- and back- office' (see *What are exactly these 'order in front/back-office' options ?*).

2. *How can I prevent certain articles from being accidentally ordered ?*

In the same menu as talked about in the question above, pick this time 'Not orderable'.

3. *As an order is done, how can a confirmation email be sent to the client ?*

A 'Send confirmation email to client' tick box is available at the last page before final order confirmation ; email will be sent to the email address as defined in this client's general information.

4. *How can I cancel an order ?*

The canceling of an order is achieved thanks to the eponymous button, as available on the *Order Details Page* (4.3).

5. *How can I quickly access to the whole order list that a particular client issued ?*

As many searches dealing with a particular client's data, her/his order list is better accessed through her/his *Client Management Page*, with the  button. This leads to a standard *Search Order Page* with all the criteria (status, salesperson, category,...) but displaying only the orders this particular client did.

6. *Is it possible to modify an order even it has been already registered ?*

Indeed, and it is done through the  button that appears right to each order after an order search. Modifying an order allows to edit everything except order status itself.

7. *A client orders the same article in a large quantity. How can I make this article appear once on the order form, with the corresponding quantity ?*

If an article is to be ordered in large quantities, its category's 'Quantity to add to shopping cart' must preferentially set to 'single occurrence with a variable quantity' (see *What is the best choice in 'Quantity to add to shopping cart' ?*)

8. *Are delivery costs mandatory for each order ?*

Of course not, as it is possible to define delivery methods that have no cost.

9. *Is it possible to define delivery costs that depend on the order's amount ?*

Indeed, and a specific example for this is given at 4.13.

## E.2.5 Invoice and Payments Management

### E.2.5.1 On invoice basic management

#### 1. How can I modify an invoice to add new items ?

Should a client want other items to be added after an order has been registered, it is indeed possible to add some more, thanks to the **Modify** button as available for *each* invoice after an invoice search ; the *Modify Invoice Page* it leads to provides a 'Article list' menu with every possible article no matter which type or category it belongs to :

### Modify invoice

...

Article	Quantity	Unit price	Total price	Total tax	Tax rate	
Chunky Choc Bar	3	2.00	6.00	0.34	6.00 %	Delete #1
Standard mail	1	8.00	8.00	0.45	6.00 %	Delete #2
<b>Total</b>			14.00	0.79		

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Article list **Cola 6-Pack**

Article	Quantity	Unit	Total price	Total tax	Total (tax incl.)	
Cola 6-Pack	5	3.00	15.00	0.85	15.00	Add

#### 2. How do I cancel an invoice ?

Only invoices for which no payment has been yet registered can be canceled, which is achieved through the **Cancel** button once again found after an invoice search right to (unpaid) invoices.

#### 3. How to display the invoices of a particular client ?

Similarly as for displaying a particular client's orders, this is best achieved through the *Client Management Page*, this time with the **Invoices** button. The same search criteria as for a normal invoice search are available, but now targeted on this client's invoices only.

#### 4. What is the use of credit notes ?

Credit notes are registered whenever *you* owe money to a client, for instance when a payment has been registered but the order has been canceled afterwards (for instance, because of a lack of items in stock).

#### 5. How can I best reconcile invoices ?

There are three main ways of using a given client's payment to reconcile her/his invoices :

- sorting the invoices with amounts decreasing, and **reconciling in priority the invoice with the biggest amount** (if there is enough money to do so), then, if enough money remains, reconciling the next invoice, and so on : this way, you are sure that the most expensive items are paid for, once for all ;
- sorting the invoices with amounts increasing, and **reconciling this way the highest possible number of invoices** : this will reduce the quantity of invoices and therefore the paperwork that may arise with possible reminders ;
- **reconciling the invoices chronologically** : this prevents the client from getting reminders (and even worse) and you from producing consequently too much paperwork.

6. *When does an invoice get the 'sent' status ?*

The 'sent' status is automatically assessed to an invoice that belonged to a successfully sent invoice print set (5.5.6).

7. *While searching invoices, what are the use of the 'Print version' and the 'Export version' ?*

While 'Normal version' (the default choice for the version menu) displays a clickable list of invoices along with buttons, the 'Print version' only features useful information and appearance (i.e. no links and no buttons) so that this list can be printed out (see Fig.E.1)

Invoice list by date				
28/7/2008	#2008072801005	paid	Bauer Kim	Bauer.Kim 29.00
28/7/2008	#2008072801003	paid	Barnes Cletus	Barnes.Cletus 12.00
...				
1/7/2008	#2008070101001	paid	Bauer Kim	Bauer.Kim 108.00
<b>Total (22):</b>			<b>1813.00</b>	

Figure E.1: An invoice search, led under 'Print version'.

The 'Export version' yields the same list, but also a flat file which contains the same information.

8. *What is the point of blocking invoices for export ?*

The 'Export:' menu, which is accessible on whatever *Modify Invoice Page*, provides two options : 'not exported' and 'blocked for export'. The former will enable this invoice to be exported to the external accounting system, while the latter will forbid it.



### E.2.5.2 On reminding invoices

1. *How to set the date at which invoices will be reminded ?*

Invoices are reminded only when you take the action of reminding them, through the **Remind open invoices** button.

2. *When is the 'second reminder' billing status triggered ?*

The 'second reminder' billing status is triggered when a reminding has been done on invoices that were already reminded once. Blue Chameleon finds automatically the invoices to be second-reminded via **Remind open invoices**, and there picking the 'Second reminder' option in the 'Reminder type:' menu.

Similarly, third reminders are generated from second-reminded invoices by picking 'Third reminder' in that menu.

### E.2.5.3 On work sets

1. *How do I practically generate invoices to be printed out and sent ?*

One of Blue Chameleon's greatest feature is the automatic generation of invoices to be sent by email and printed out, through *work sets*. Simply follow the method described in 5.5.2 : first create an 'Invoice' work set, with the template that you'd like to see as a result ; this includes for instance filling in a personalized mail header, footer, prologue.

Then, **Add invoices to set** and finally **Send set** : a PDF file has been generated featuring all the invoices you added, one after the other, in a formal presentation including the ordered article, the client's general information and the template you defined.

2. *How do I see then which invoices have been sent ?*

Invoices that have been sent (through the process described above) can be easily displayed with an invoice search, by selecting 'sent' in the 'Status:' menu :

Blue Chameleon ensures that invoices that have been sent do not appear when adding invoices to a work set for sending.

3. *How can I send reminding emails to clients who have not paid ?*

The whole process of sending reminding emails is described lengthfully at 5.5.5. It is also worth noting that the same method exactly applies for second and third reminders. If these are ever needed, you may want to define their dedicated work

sets : indeed, the general tone of a second (moreover third) reminder as it appears in the mail template is to be more exigent than a first reminder's is.

#### E.2.5.4 On client payments

1. *How can I quickly see the balance of my clients' payments ?*

Through **Client payments** / **Client balances**, you can access to the global result of the sums of credits, debits and therefore balance. The dates until which invoices and payments are taken into calculation are set by default to the current day.

2. *What is the use of 'internal authorization' ?*

Some orders might be placed for non-tangible goods such as subscriptions. Despite a payment for such a good has not been registered, you might still want to declare the ordering client as granted access to the ordered facility : that is what 'internal authorization' means.

### E.2.6 General Accounting

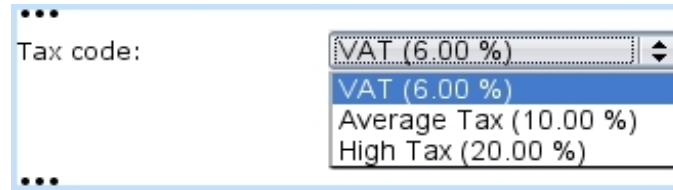
#### E.2.6.1 On bank accounts and payment methods

1. *How can I add a bank account that is not in my country ?*

[In Development]

2. *Is it possible to define different taxes ?*

Through use of the **Add new tax** button found through **General** / **Miscellaneous** / **Taxes**, you can add as many taxes as you wish. Whenever a tax code has to be defined (when creating a new article, for instance), a drop-down menu lets you pick which tax you want :



3. *Most of my payments are done via Paypal ; does Blue Chameleon handle this ?*

Of course, Paypal is one the payment methods that is pre-defined in Blue Chameleon.

### **E.2.6.2 On exporting to External System**

1. *Whereto are exports made ?*

If OGA is equipped on your Blue Chameleon account, exports are done to OGA either manually (6.1.2) or automatically (6.1.3) provided that, while on the page as accessed via  the 'Export into local accounting system:' box is ticked.

2. *Can I use another External Accounting system than OGA ?*

Of course, the use of Blue Chameleon's Online General Accounting tool is not mandatory ; for that matter, while exporting to external system, a .XML file can be generated as described in 6.1.2.

### **E.2.6.3 On OGA**

1. *What charts of accounts are handled by OGA ?*
2. *Why can't I achieve modifications or reconciliations on certain transactions ?*

For transactions to be modified or reconciled, the journal (6.5.4) they belong to (as chosen when transaction was recorded, 6.5.6.2) must have 'Allow modifications/reconciliations on journal's postings' checkboxes ticked.

Those can be modified anytime via  /  / *Journal* .

This issue only rises if journal is of the 'General' or 'Shop to general accounting' types, for which modifications/reconciliations can be allowed or not, contrary to the other journals ('Opening balance', 'Opening/closing balance').

## E.2.7 General Tools

### E.2.7.1 On News

1. *Are other users immediately warned of any news that I publish ?*

Published news will instantly appear on a user screen whenever s/he user logs in or clicks on **Home** ; provided that s/he has enabled the 'News' event control (1.7), which is strongly advised. Otherwise, s/he will see this recent news piece as soon as s/he goes onto **Add-ons** / **News**.

2. *How do I restrict/authorize news broadcast for my users ?*

For whatever reasons, some news emanating from certain users may not be of interest to some other users groups. So, for a specific user, here is an example of how her/his news rights are set, from the News Administration Page (7.1.1) :

Access Rights :		
Accounting	None	Ok
Administrator	Create/Delete/Modify	Ok
Customer Support Group	Create/Delete/Modify	Ok
External Relations	None	Ok
Sales Department	None	Ok

This way, this user only issues news to the Administrator and Customer Support user groups, as shown below :

Send to :
<input checked="" type="checkbox"/> Administrator(admin)
<input checked="" type="checkbox"/> Customer Support Group(James; Karen)

### E.2.7.2 On Agenda

1. *Is it possible to have coming appointments remembered as I log into Blue Chameleon ?*

Indeed, and for this, you must have the Agenda event control enabled (1.7). Also, it is possible to set alarms for them (7.3.4).

2. *My agenda is full of appointments ; how could I make easier distinction between them ?*

The RV types page (7.2.2.1) can be of help. There, as shown below, you can define a color (7.2.2.2) for each RV type ; it is then advised to carefully choose/modify

them so that, as a result, appointments can easily be told apart on the Agenda page, as seen as a result on Fig.E.2.

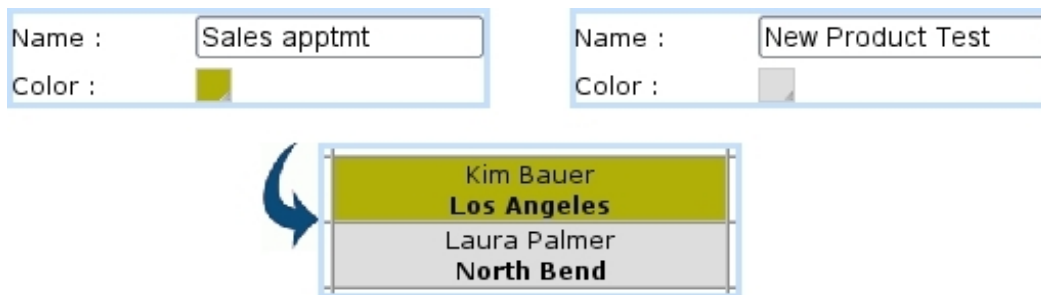


Figure E.2: Setting two different colors for two appointment types.

What is more, a *particular* appointment can be emphasized by changing its color on its *Modify Page* (7.2.3.2), provided that related type had 'Modifiable:' (below color) checked.

### E.2.7.3 On File Manager

1. *What kind of files can I upload on the File Manager ?*

Basically any kind of file can be uploaded to the File Manager as no discrimination is made upon the file extension.

2. *Is there a size limit to upload a file ?*

Large files can be uploaded, with the constraint of uploading time.

3. *How can I update files on the File Manager ?*

In order to update files, it is enough to upload the file again, in the same folder : a pop-up then asks you if you want to replace the file, which you will accept.

4. *How can I easily move a file from one folder to another ?*

The simplest of displacing a file is downloading it, then erasing it on its File Manager former location and finally upload it in its new location.

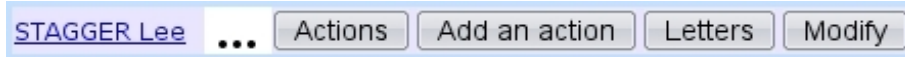
### E.2.7.4 On Customer Relationship Management

1. *How can I tell clients from prospects ?*

Prospects only appear in the context of CRM ; it is then easy to distinguish them from other clients as they appear (after a contact search) in a violet background instead of a grey one.

2. *How can I modify a prospect's general information ?*

After a contact  through which your contact appears, you will find your prospect along with four buttons :



The  button then enables to display a pop-up window with the editable general information that had been inputed while at this prospect's creation.

It is to note that this button only appears for prospects : standard clients' general information is edited on the other hand in the Clients interface.

3. *How to move a contact from one contact list to another ?*

This can be achieved most easily by first removing this contact from her/his primary list and then adding her/him on the new list. As a reminder, both lists are accessed lengthfully via the [Modify](#) link as found after a contact list search.

4. *How should I keep documents ready for mailings and campaigns ?*

Documents for mailings and campaigns can only be created in the Customer Relationship Manager context, through . But, once created, a document can be used for any campaign or mailing : thus, it is possible to write "basic" documents containing only the client's information, the date,... (D.1.6) along with a writing paper and a constant header and footer (D.2).

Then saved, such a basic document can be opened through  and expanded according to the specifics of a particular campaign or mailing.

5. *How do I get the list of all actions issued on a contact ? Is it possible to print it out ?*

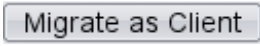
The  button as found after a contact search (see *How can I modify a prospect's general information ?*), whether client or prospect, allows to displays the actions taken on her/him :

Date	User	Client	Action	Status	Type	
21/10/2008 10:00	Malone Richard	<a href="#">STAGGER Lee</a> (5559510)	On 21 Nov 2008 at 10AM, we [...]	To do	Call	<a href="#">Modify</a>
8/10/2008 15:18	Malone Richard	<a href="#">STAGGER Lee</a> (5559510)	New Offer for L.A. Residents !!	Other	Mail	<a href="#">Modify</a>
8/10/2008 11:00	Malone Richard	<a href="#">STAGGER Lee</a> (5559510)	Appt. w/ Mr.Stagger has been [...]	User	Appointment	<a href="#">Modify</a>

**Nb of Actions : 3**

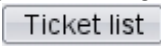

As it can be seen, it is possible to  this list (in development). Also, if needed, a particular action can be edited by clicking on [Modify](#).

6. *A prospect can now be considered as a full-fledged client. How do I move her/him to the client list ?*

In order to "promote" a prospect as a client, display the pop-up window on which her/his general information can be edited, as described in *How can I modify a prospect's general information ?* above : at the bottom of this window, a  button is available to achieve this promoting.


## E.2.8 Customer Support

1. *How can I easily get the record of complaints that a client issued ? Is it possible to print it out ?*

The *Client Management Page* for the client whose tickets you wish to see conveniently provides a , which displays in a pop-up window the list of tickets that have been issued for this client. There, it becomes also possible to print this list thanks to a dedicated  button.

2. *I want to make the Blue Chameleon's ticket system more personalized to my activities. What can I do ?*

According to the different types of complaints your customer support service receives, you may want to define more than one ticket type (the default-defined one being 'customer'). To do so, follow the guideline to create a new ticket type (A.4). Then, be sure that user groups that might issue tickets of this new type (for instance, a 'Suppliers' ticket type should be accessed by members of a user group dealing with external relations) by adding it to the list of ticket types that they can issue (A.5).

Finally, at the user level go to  to set to 'any' the 'Ticket Types :' menu for this user's corresponding user group (A.4.3).

If on the other hand you do not want to create a new ticket type, add categories parameters to the default ticket type as described in A.2.2.1. In that example, the default ticket type is given a new property (or category) called 'Complaint' which has two values (or parameters), 'Product-related' and 'Service-related'.

3. *How do I choose the type of ticket that I'm issuing ?*

A user may issue the ticket type that is defined as default for her/his user group (A.5).

4. *Is a client warned everytime an action is done on her/his complaint ?*

It is possible to warn a client everytime an action is accomplished on her/his ticket, by ticking the 'Notification email/SMS' boxes. But, if you wish to do an action without warning client of it, simply leave these boxes unticked.

5. *Is there a way to display the time evolution of issued client complaints ?*

In order to check how a complaint is solved, Blue Chameleon records any action or assignment taken on the ticket by day, time, user. The record of these can be then displayed anytime by [viewing](#) this ticket.

6. *Is client satisfaction is not met, is it possible to re-open a ticket ?*

Of course, and this can be done anytime after ticket closure. Be sure to display that to-be-reopened ticket through a ticket search including closed tickets (pick either 'closed' or 'any' for the 'Status:' menu). Next, [viewing](#) it will dutifully provide a  button.

## E.2.9 General Configuration

### E.2.9.1 On Blue Chameleon general appearance

1. *How can I add images, icons... to render Blue Chameleon more personal ?*

Different images can be added in the way described at 9.7 ; it is possible to add images for the following elements of your Merchant :

- article types and categories ;
- articles ;
- shops.

### E.2.9.2 On Merchant/shops/salespersons...

1. *What is the difference between the Merchant and a shop ?*

The Merchant may be considered as the main entity through which your business activity is done. Then, it can be refined through defining several shops if you happen to have several sale outlets : for instance, it renders delivery matters more accurate, in particular for the 'Pick up order at shop' delivery method. At least one created shop is by the way mandatory if you use that delivery method.

2. *Can I define several shops ?*

Of course. Once a shop has been created through  / , other ones can be readily defined without limitations.

3. *Where are resellers useful in Blue Chameleon ?*



4. What does the 'credit control class' refer to ?

A credit control class consists in defining a credit baseline...

5. Are defined salespersons a requirement to use Blue Chameleon ?

Of course not, it remains absolutely possible to make orders without any salesperson defined. Salespeople enable to keep a track of who did which order.

## E.2.10 Advanced Functions and Configuring

### E.2.10.1 Ticket issuing prerogatives and administration

1. How to prevent certain users from receiving tickets that they could not process anyway ?

This requirement is in fact ensured right at the beginning : instead of blocking the *receiving* of a ticket by an unrelated user, Blue Chameleon rather primarily prevents it to be *assigned* to that wrong user.

Assignments rights are set from ticket user administration page (as accessible via [Helpdesk](#) / [Administration](#) / [Users](#)), for instance :

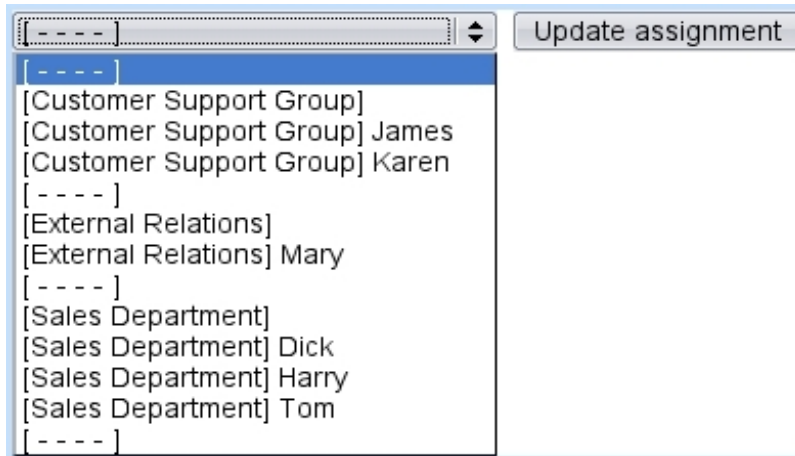
		Assignment Mode
Accounting		No
Administrator		No
Customer Support Group	...	Yes
External Relations		Yes
Sales Department		Yes

There, that user will not be able to send any ticket to Admin and to any user member of the Accounting user group : as shows the picture below, Admin and the Accounting user group will not even appear in the Assignment menu :

It can be noticed that user Mary, who is also a member of the Accounting group, still appears in this menu : but she appears as a member of the External user group, to which assignment was authorized. That is because the Blue Chameleon ticket assignment system is not based upon a user's skills, but upon her/his skills *as a member of a particular user group*.

### E.2.10.2 Setting user rights

1. The list of rights is too long. How can I rapidly set them up for my user accounts ?



While you get more accustomed to Blue Chameleon functioning, it bears no serious consequence to assess automatically admin's rights to a user by selecting 'admin' at the top of the *Modify User Page/Add User Page* :



This is the quickest way to achieve it. Also, you can assess 'Delete/Create/Rights' for a specific user's every right and then use this user to be copied rights from.

2. *One of my users has no access to a certain part of Blue Chameleon : why ?*

This is because your user has 'None' as the right for that specific part : be sure to check the relevant line, assess 'Delete/Create/Modify' and try again.

3. *How is the 'Delete/Create/Modify' right any different from the 'Unrestricted' one ?*

At first glance, the former seems to bear no difference with the latter ; but it must be kept in mind that 'Unrestricted' specifically concerns the Administrator, allowing her/him to perform very specific things that any other user with 'Delete/Create/Modify' could not do.

**E.2.10.3 Main Menu personalization**

**E.2.10.4 The Document Editor**