CAMSEG SCM

User Manual

Version 2.6

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Chapter 1 – Introducing CAMSEG SCM

1.1 What is CAMSEG SCM

CAMSEG SCMis an application designed to manage sales campaigns. It contains all the features required to manage the campaign data (customers, products, etc) and sales, including powerful Stock Management functionalities. A very extensible report system is also included, allowing almost unlimited report possibilities.

1.2 The CAMSEG SCM interface

The CAMSEG CSM interface is composed of a menu bar, a toolbar and four main tabs. The tabs contains the most used elements of the interface, while the most advanced and less used features are accessible in the menus. The two first tabs contains 'sub-tabs', also knows as Modules.

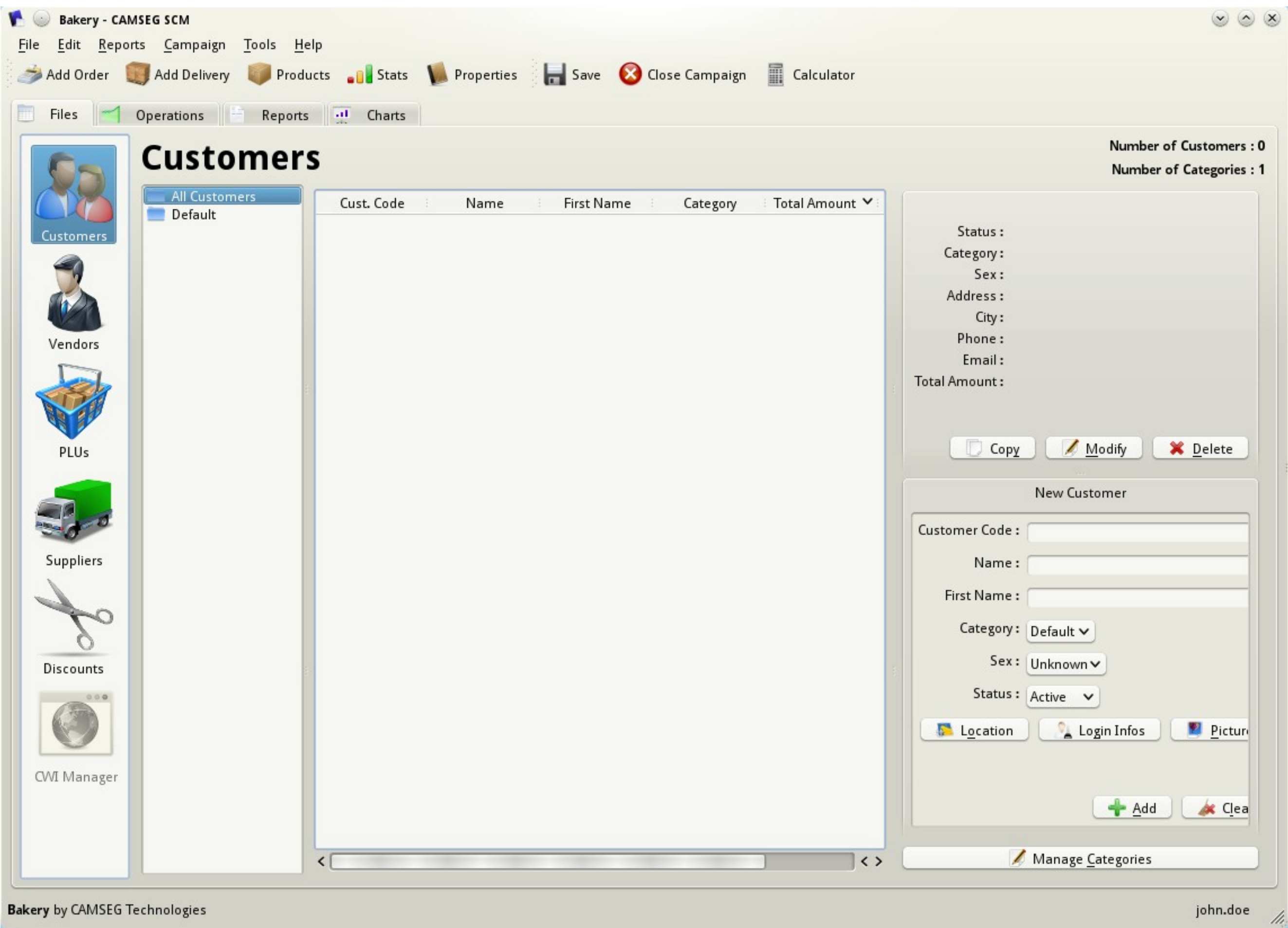


Illustration 1: The Files Tab

1.2.1 Tabs

There are four main tabs which contains the most important elements of the application :

- Files : General data about the campaign, 6 modules :
    - Customers : Module to manage customers (shortcut : F2)
    - Vendors : Module to manage vendors (shortcut : F3)
    - PLUs : Module to manage PLUs (shortcut : F4)
    - Discounts : Module to manage discounts (shortcut : F5)
    - Suppliers : Module to manage suppliers (shortcut : F6)
    - CWI Manager : Module to manage CWI (the CAMSEG SCM Web Interface) (shortcut : F7)
- Operations : Sales management and day-to-day operations, 5 modules
    - Operations Overview : A global overview of the current and expected revenues and costs (shortcut : Ctrl+Shift+O)
    - Orders : Module to manage orders (shortcut : F8)
    - Deliveries : Module to manage deliveries (shortcut : F9)
    - Payments : Module to manage payments (shortcut : F10)
    - Inventory : Module to see the product inventory (current, expected, etc.) (shortcut : Ctrl+Shift+I)

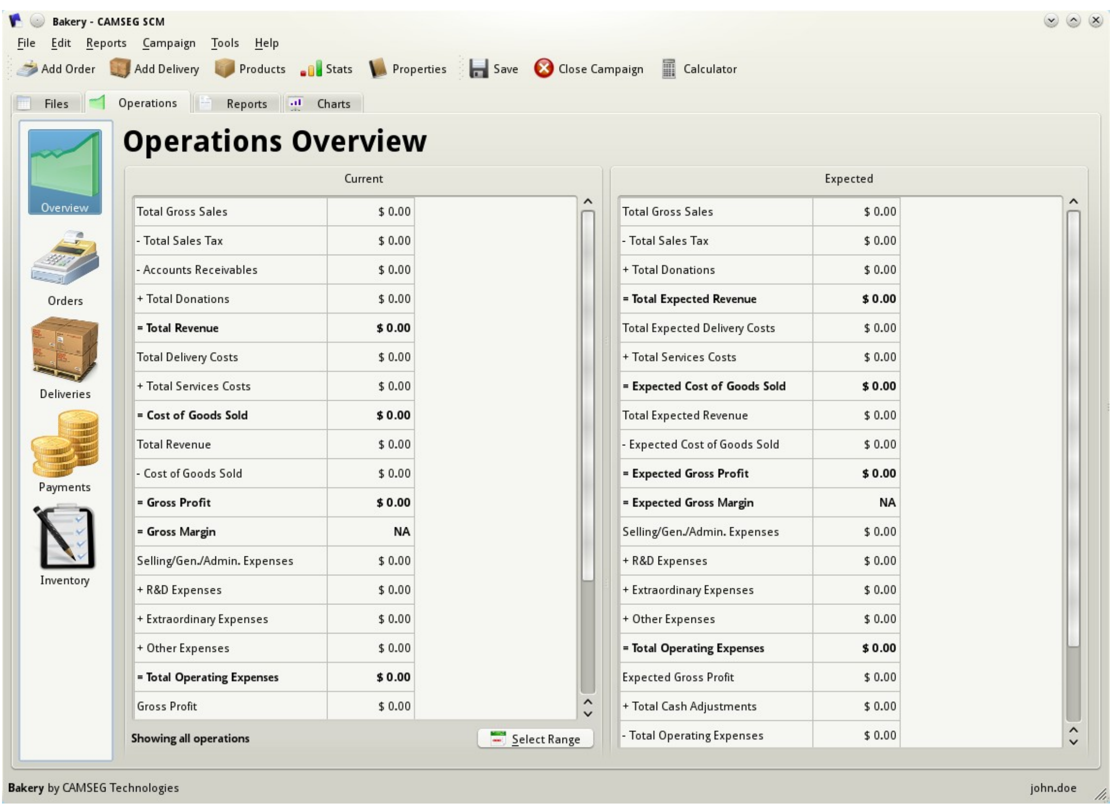


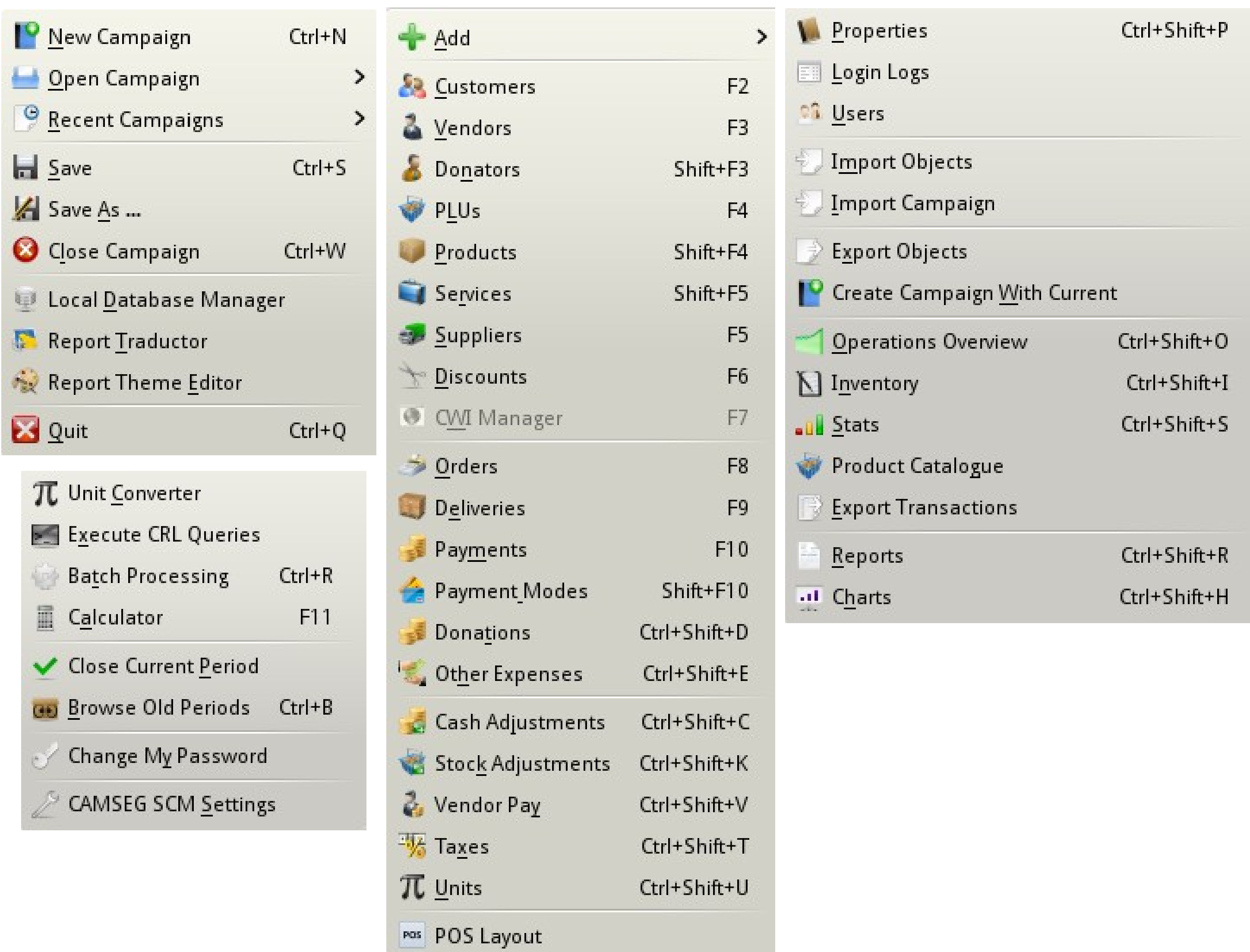
Illustration 2: The Operations Tab

- Reports : The reports
- Charts : The charts

1.2.2 Menus

All the features of CAMSEG SCM, including the modules presented in 1.2.1, can be accessed using the menus. There are 6 menus :

- File : General commands, such as Open, Save or Quit
- Edit : Commands to access the different modules, such as Customers, Orders, Other Expenses and Stock Adjustments
- Reports : Contains all the reports that can be generated. If you choose a report in this menu, the current view will switch to the Reports tab and the report will be opened.
- Campaign : Contains campaign specific commands, such as Campaign Properties and Export Transactions.
- Tools : Contains generic tools, such as the Calculator and Execute CRL Queries
- Help : Contains a link to the Help System and information about the program.



1.3 Creating a campaign

Creating a campaign is necessary to use CAMSEG SCM. To do so, follow these instructions :

1. Open CAMSEG SCM
2. Open the menu *File* > *New Campaign* (or Ctrl+N)
3. The following wizard will show up. Click on *Next* to continue

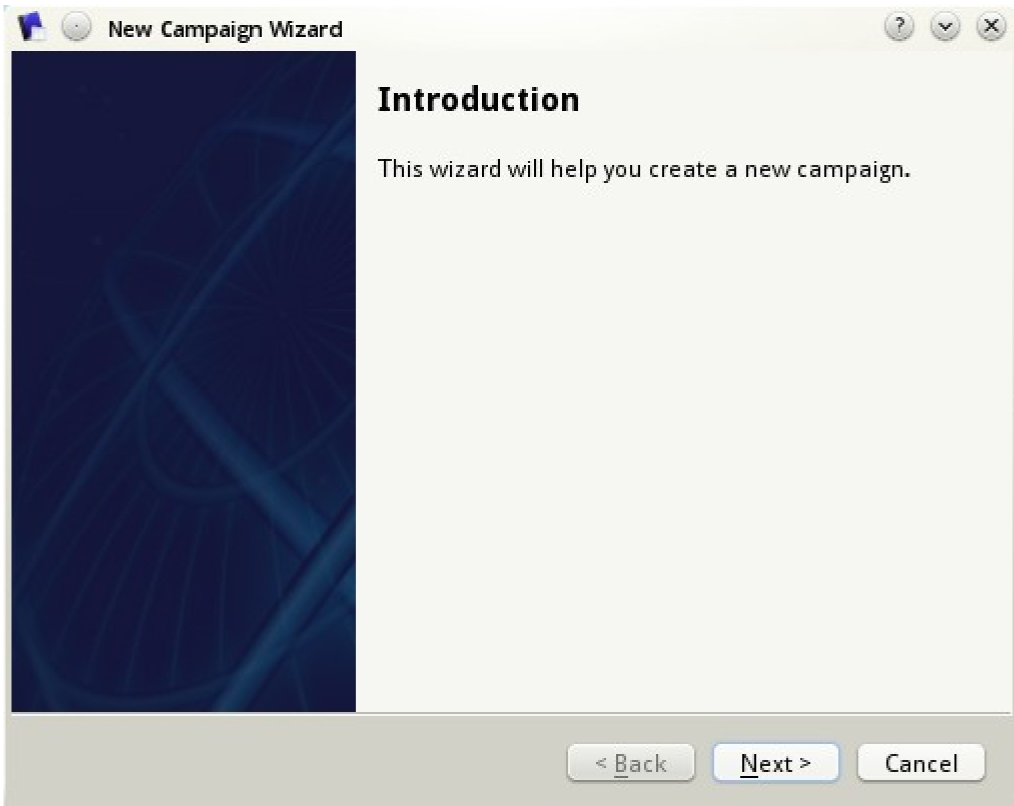


Illustration 3: The New Campaign wizard

4. Enter the campaign name (ex : 2009-2010 Sales Campaign) and choose the currency. Make sure the Local File option is checked. The different storage formats will be explained later. Click on *Next* to continue.
5. Enter your organization's information. Only the name is required. You can set the address by clicking the *Location* button, and the logo by clicking the *Picture* button. Click on *Next* to continue.
6. Select the location where the campaign will be saved on the disk. Click on *Next* to continue.
7. Create the campaign administrator. You need to enter the name, first name and login. The password is not required, but strongly recommended to protect your campaign. Each time you open the campaign, the application will ask your login and password. Make sure to remember your password because you wont be able to open the campaign anymore if you loose it. For more informations about users, see section 2.15. Click on *Next* to continue.

8. The campaign is now ready to be created. If you want to open the campaign right away, check the *Launch campaign after creation* box. Click on *Finish* to create the campaign.

CAMSEG SCM supports many storage formats for the campaigns, but only two are currently available :

- File based : the most used format, very fast and reliable
- Local database (SQLite) : New format since CAMSEG SCM 2.5, may replace file-based campaigns in future releases. It has a few advantages over file-based format :
  - All modifications are directly stored in the database, so there is no need to save the campaign;
  - Referential integrity;
  - Very portable
- MySQL database : currently in development, supports a Web Interface
- Network : currently in development, multiple users can use the same campaign at the same time on different computers. Requires a server.

1.4 Opening a campaign

There are many ways to open a campaign :

- The *File > Open Campaign* menu
- The *File > Recent Campaigns* menu : contains the recently-used campaigns
- In the Welcome Screen, the *Open Existing Campaign* menu
- In the Welcome Screen, the *Recent Campaigns* list.

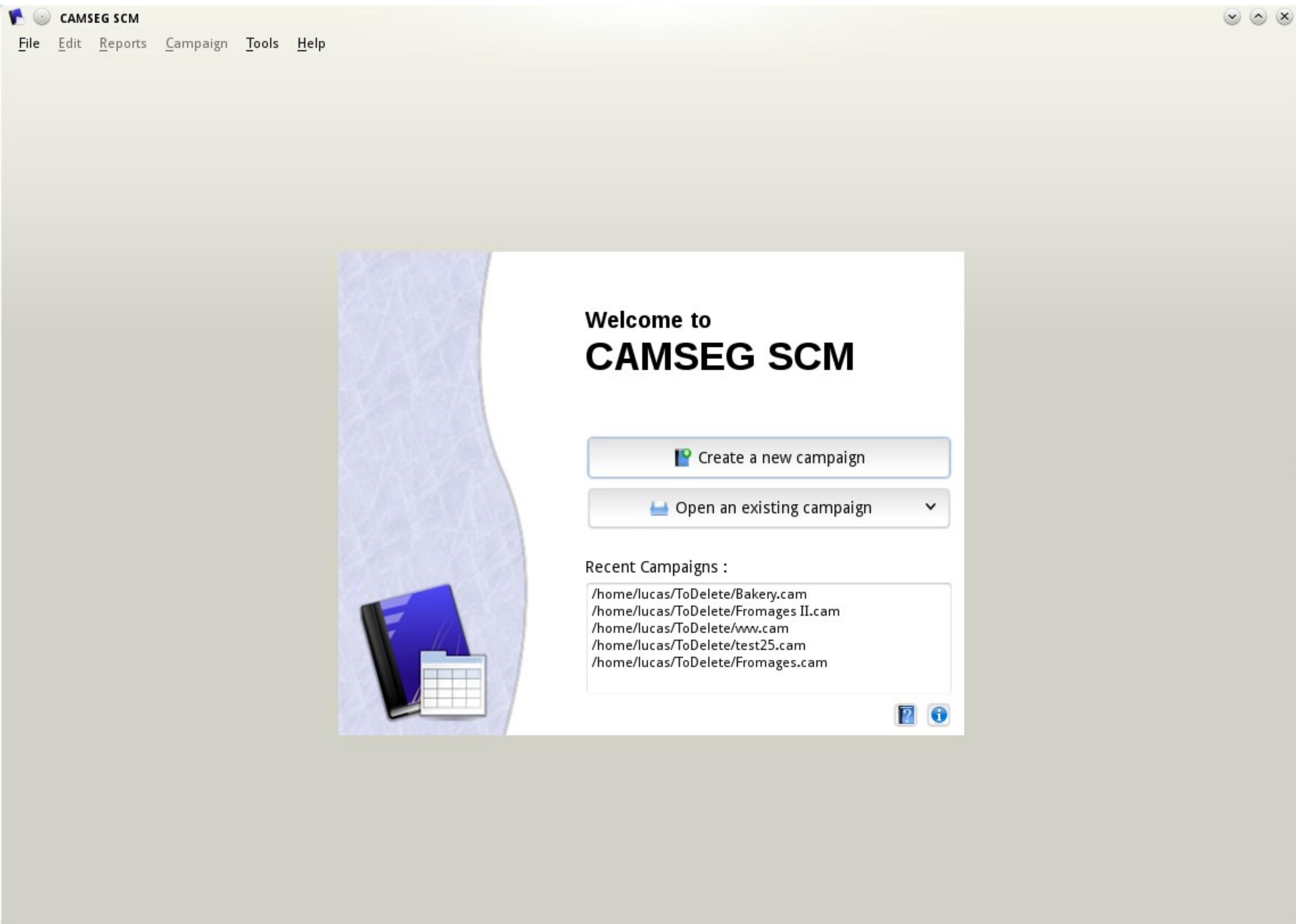


Illustration 4: The Welcome Screen

Chapter 2 – Using CAMSEG SCM

2.1 Customers

A customer is a person or an organization who buys goods or services in the campaign. To create, modify and delete customers, you need to open the Customers module (Edit > Customers or press F2).

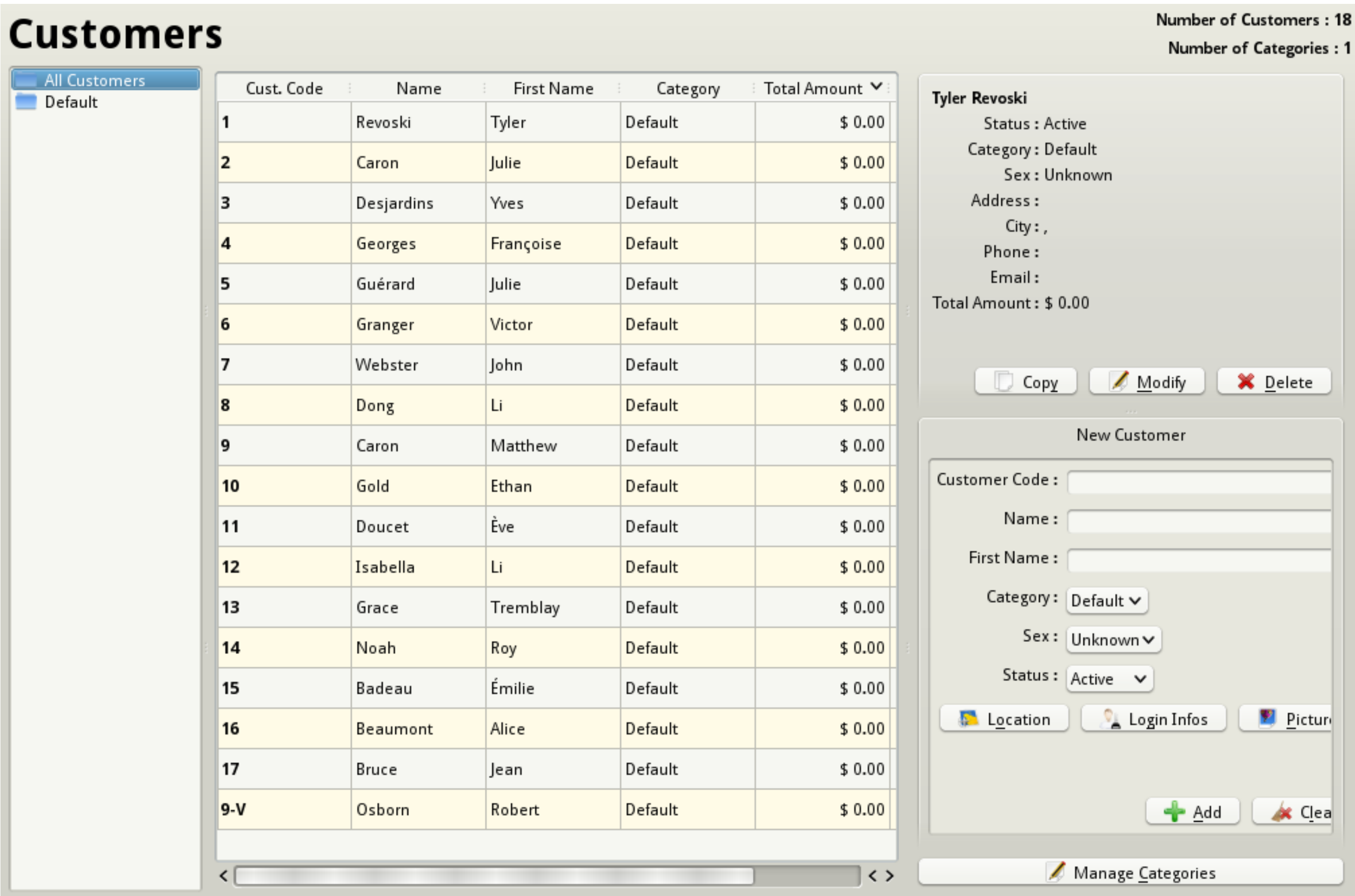


Illustration 5: The Customers Module

The table in the center displays all the customers from the category selected in the list on the left. If the category is *All Customers*, all the customers will be displayed. A category that has sub-categories will also display the customers of the sub-categories. In the top-right section of the screen, informations about the currently selected customer are displayed, along with the *Copy*, *Modify* and *Delete* buttons. To select a customer, click on it in the central table. To manage customer categories, click on the *Manage Categories* button located in the bottom-left section of the screen.

To search a customer in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a customer by its name, first name or status. To close the search bar, click on the red X or re-press Ctrl+F.

2.1.1 Add a new customer

To add a new customer, you need to fill the New Customer area in the bottom-right section of the screen, and click on Add (or press Alt+A). To clear the New Customer area, click on the Clear button (or press Alt+L).

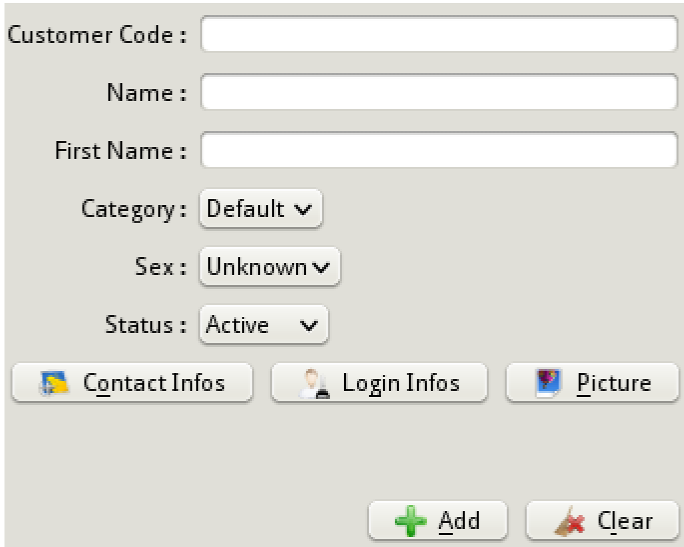


Illustration 6: New Customer Area

Customer Code : The code of the customer. If you leave it empty, a code will be automatically generated.

Name : The customer's name

First Name : The customer's first name

Sex : The customer's sex

Category : The category to which the customer belongs

Status : The customer's status (Inactive customers cannot make new orders)

Contact Infos : The customer's contact informations and address

Login Infos : The customer's login information (used for CWI)

Picture : A picture of the customer (can be used in reports)

2.1.2 Modify a customer

To modify a customer, select it in the central table and click on the Modify button (or press Alt+M). You can also double-click on it in the central table. The *Modify Customer* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.1.3 Delete a customer

To delete a customer, select it in the central table and click on the Delete button (or press Alt+D). Note that you cannot delete customers who made orders or donations.

2.2 Vendors

A vendor is a person who sells goods or services in the campaign. To create, modify and delete vendors, you need to open the Vendors module (Edit > Vendors or press F3).

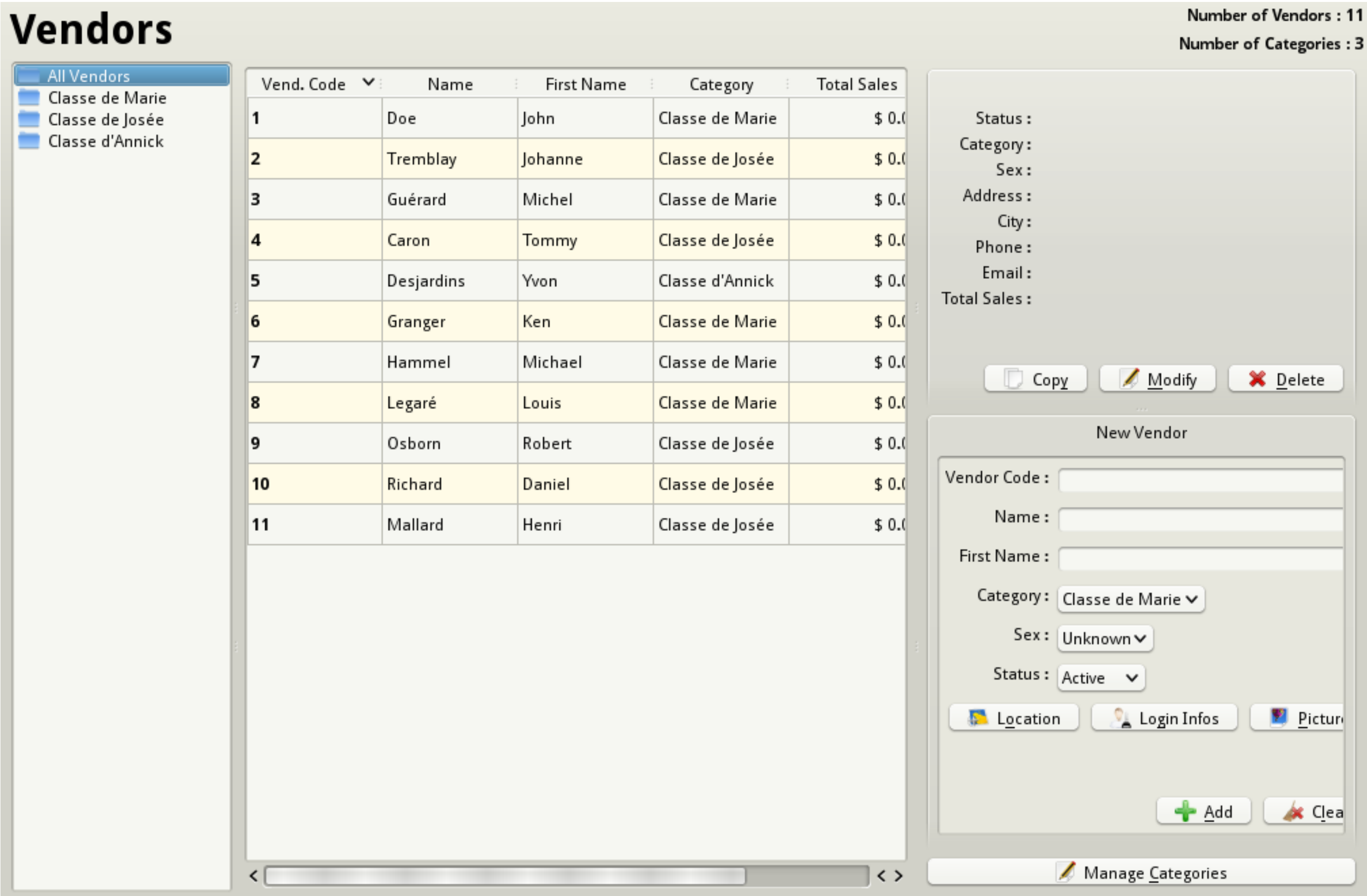


Illustration 7: The Vendors Module

The table in the center displays all the vendors from the category selected in the list on the left. If the category is *All Vendors*, all the vendors will be displayed. A category that has sub-categories will also display the vendors of the sub-categories. In the top-right section of the screen, informations about the currently selected vendor are displayed, along with the *Copy*, *Modify* and *Delete* buttons. To select a vendor, click on it in the central table. To manage vendor categories, click on the *Manage Categories* button located in the bottom-left section of the screen.

To search a vendor in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a vendor by its name, first name or status. To close the search bar, click on the red X or re-press Ctrl+F.

2.2.1 Add a new vendor

To add a new customer, you need to fill the New Vendor area in the bottom-right section of the screen, and click on Add (or press Alt+A). To clear the New Vendor area, click on the Clear button (or press Alt+L).

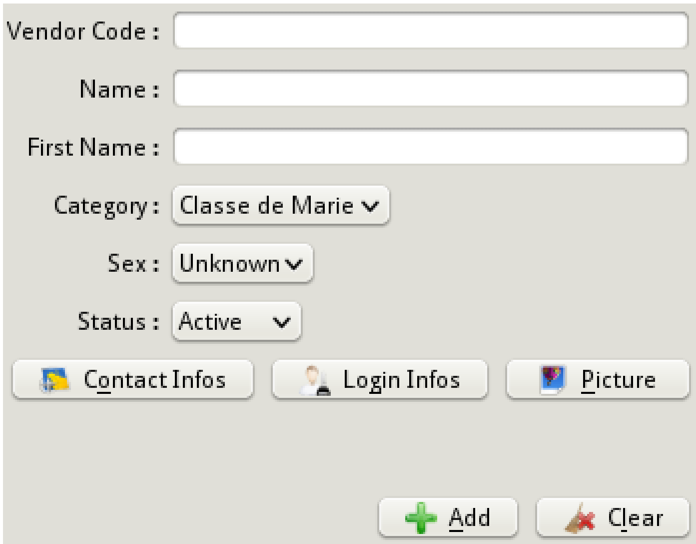


Illustration 8: New Vendor Area

Vendor Code : The code of the vendor. If you leave it empty, a code will be automatically generated.

Name : The vendor's name

First Name : The vendor's first name

Category : The category to which the vendor belongs

Sex : The vendor's sex

Status : The vendor's status (Inactive vendors cannot make new orders)

Contact Infos : The vendor's contact informations and address

Login Infos : The vendor's login information (used for the Vendor Login)

Picture : A picture of the vendor (can be used in reports)

2.2.2 Modify a vendor

To modify a vendor, select it in the central table and click on the Modify button (or press Alt+M). You can also double-click on it in the central table. The *Modify Vendor* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.2.3 Delete a vendor

To delete a vendor, select it in the central table and click on the Delete button (or press Alt+D). Note that you cannot delete vendors who made orders.

2.3 Suppliers

A supplier is an organization to whom you buy products. To create, modify and delete suppliers, you need to open the Suppliers module (Edit > Suppliers or press F5).

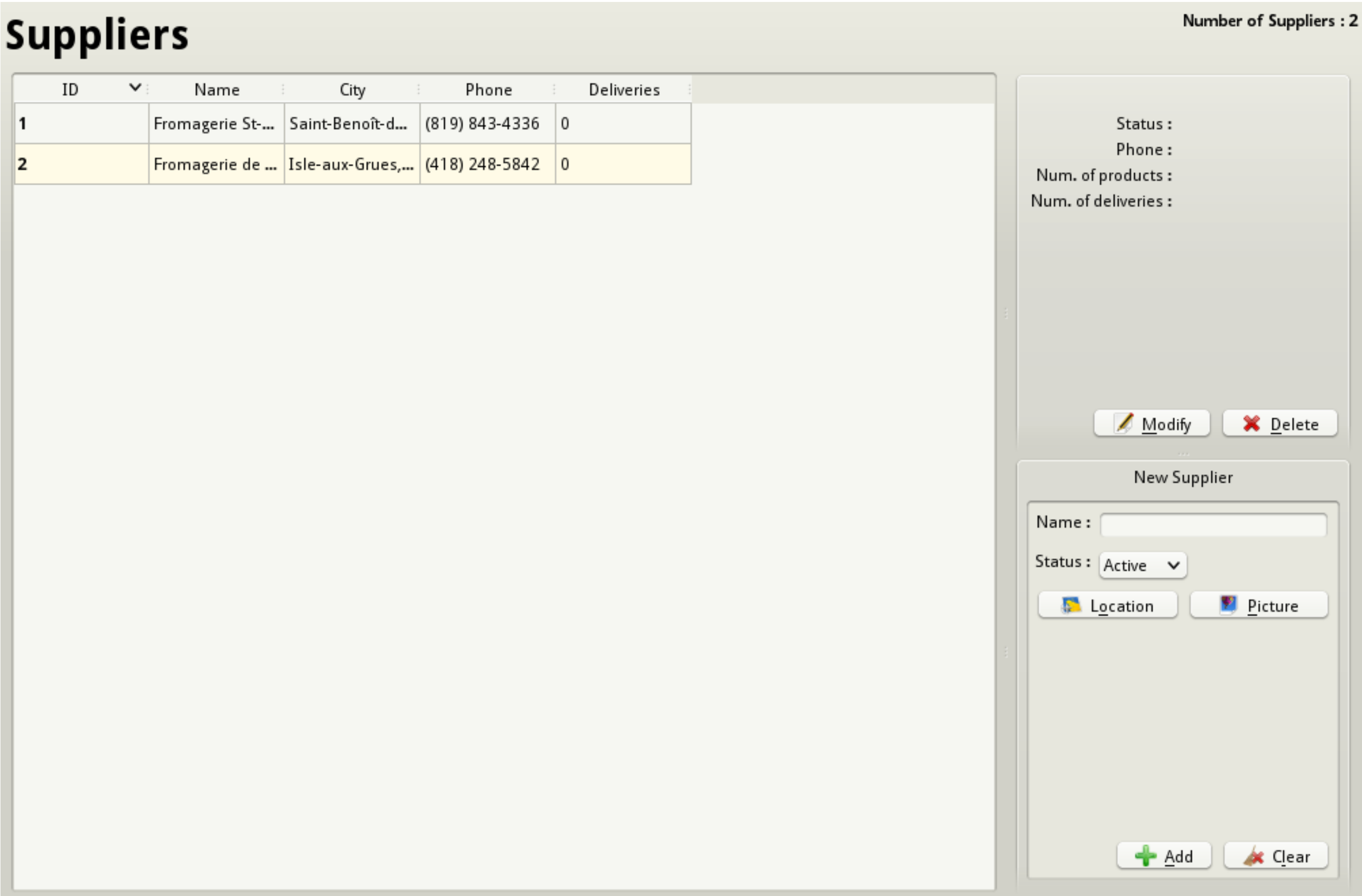


Illustration 9: The Suppliers Module

The table in the center displays all the suppliers. In the top-right section of the screen, informations about the currently selected supplier are displayed, along with the *Modify* and *Delete* buttons. To select a supplier, click on it in the central table.

To search a supplier in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a supplier by its name or status. To close the search bar, click on the red X or re-press Ctrl+F.

2.3.1 Add a new supplier

To add a new supplier, you need to fill the New Supplier area in the bottom-right section of the screen, and click on Add (or press Alt+A). To clear the New Supplier area, click on the Clear button (or press Alt+L).

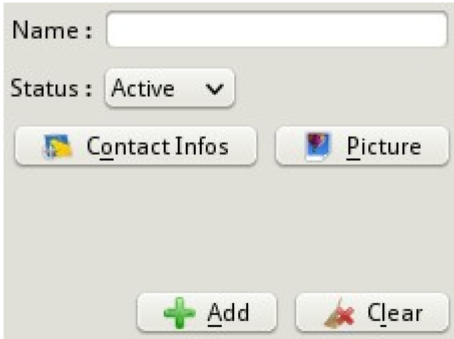


Illustration 10: New Supplier Area

Name : The supplier's name

Status : The supplier's status (Inactive customers cannot make new deliveries)

Contact Infos : The supplier's contact informations and address

Picture : The supplier's logo (can be used in reports)

2.3.2 Modify a supplier

To modify a supplier, select it in the central table and click on the Modify button (or press Alt+M). You can also double-click on it in the central table. The *Modify Supplier* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.3.3 Delete a supplier

To delete a supplier, select it in the central table and click on the Delete button (or press Alt+D). Note that you cannot delete suppliers who made deliveries.

2.4 Taxes

To create, modify and delete taxes, you need to open the Taxes module (Edit > Taxes or press Ctrl+Shift+T).

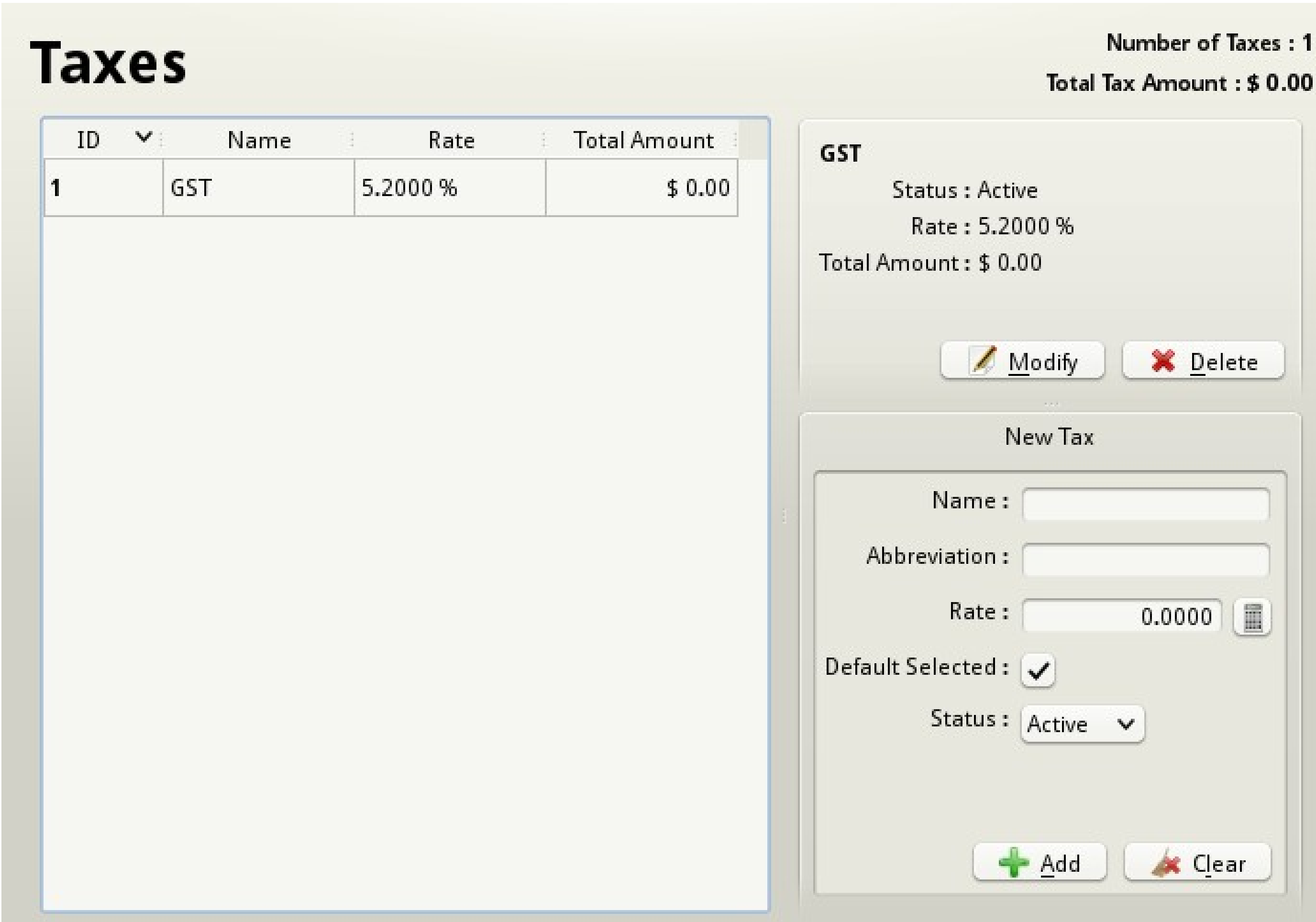


Illustration 11: The Taxes Module

The table in the center displays all the taxes. In the top-right section of the screen, informations about the currently selected tax is displayed, along with the *Modify* and *Delete* buttons. To select a tax, click on it in the central table. The Total Amount column of the table represent the total amount collected for each tax. A total of all taxes is displayed in the top-right section of the screen as *Total Tax Amount*.

To search a tax in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a tax by its name or status. To close the search bar, click on the red X or re-press Ctrl+F.

2.4.1 Add a new tax

To add a new tax, you need to fill the New Tax area in the bottom-right section of the screen, and click on Add (or press Alt+A). To clear the New Tax area, click on the Clear button (or press Alt+L).

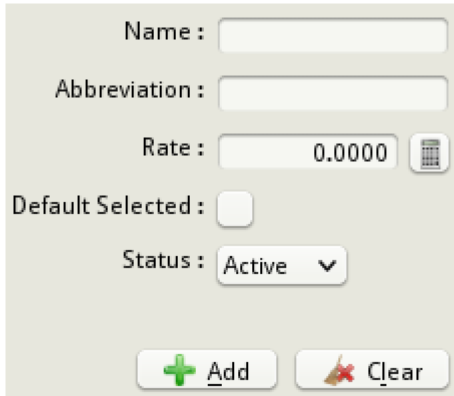


Illustration 12: New Tax Area

Name : The tax's name

Abbreviation : A single-letter abbreviation for the tax. This is used for order reports, to show the different taxes applied to the order items. For example, if an item had *FT* as its tax description, it would mean the *F* and the *T* taxes are applied to this item.

Rate : The tax's rate (between 0 and 100 %).

Default Selected : If this box is checked, the tax will be selected by default in new PLUs or Services.

Status : The tax's status (Inactive taxes are not displayed for new PLUs or Services)

2.4.2 Modify a tax

To modify a tax, select it in the central table and click on the Modify button (or press Alt+M). You can also double-click on it in the central table. The *Modify Tax* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.4.3 Delete a tax

To delete a tax, select it in the central table and click on the Delete button (or press Alt+D). Note that you cannot delete taxes that are used by PLUs or Services.

2.5 Products and PLUs

2.6 Services

Services can be sold to customers. To create, modify and delete services, you need to open the Services module (Edit > Services or press Shift+F5).

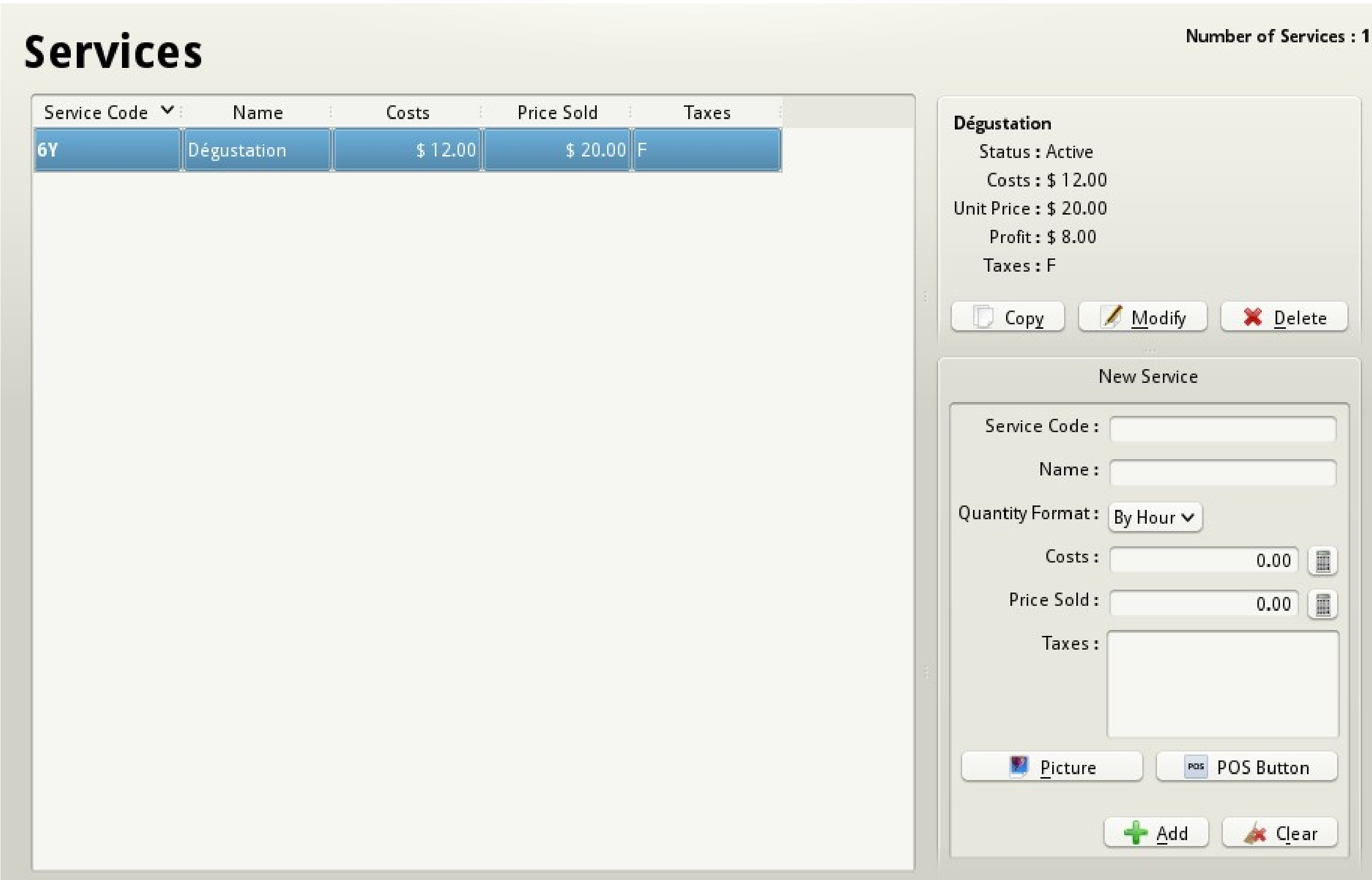


Illustration 13: The Services Module

The table in the center displays all the services. In the top-right section of the screen, informations about the currently selected service are displayed, along with the *Copy, Modify* and *Delete* buttons. To select a service, click on it in the central table.

To search a service in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a service by its name or status. To close the search bar, click on the red X or re-press Ctrl+F.

2.6.1 Add a new service

To add a new service, you need to fill the New Service area in the bottom-right section of the screen, and click on Add (or press Alt+A). To clear the New Service area, click on the Clear button (or press Alt+L).

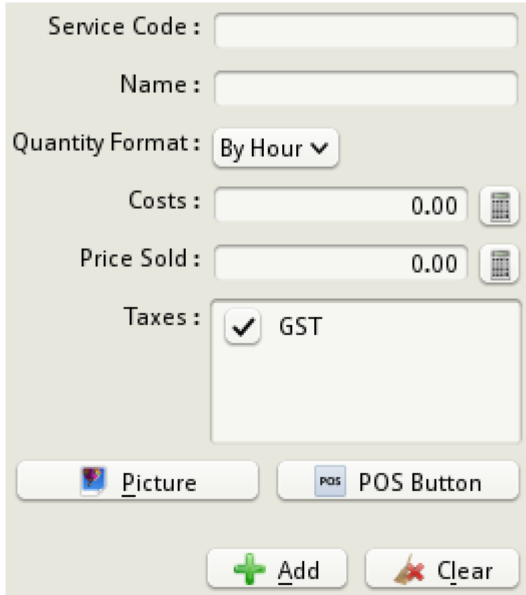


Illustration 14: New Service Area

Service Code : The code of the service. If you leave it empty, a code will be automatically generated.

Name : The service's name

Quantity Format : The format in which the service is quantified (in hours or each)

Costs : The cost of this service (for 1 hour or unit)

Price Sold : The service's price sold (for 1 hour or unit)

Taxes : The taxes applied to this service

Picture : A picture of the service (can be used in reports)

POS Button : The service's POS button (for POS environments)

To enter a description for the service, you must first add the service, and then modify it to add the description.

2.6.2 Modify a service

To modify a service, select it in the central table and click on the Modify button (or press Alt+M). You can also double-click on it in the central table. The *Modify Service* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.6.3 Delete a service

To delete a service, select it in the central table and click on the Delete button (or press Alt+D). Note that you cannot delete services that have been sold.

2.7 Discounts

Discounts can added to orders to reduce the price of certain items or of the whole order. To create, modify and delete discounts, you need to open the Discounts module (Edit > Discounts or press F6).

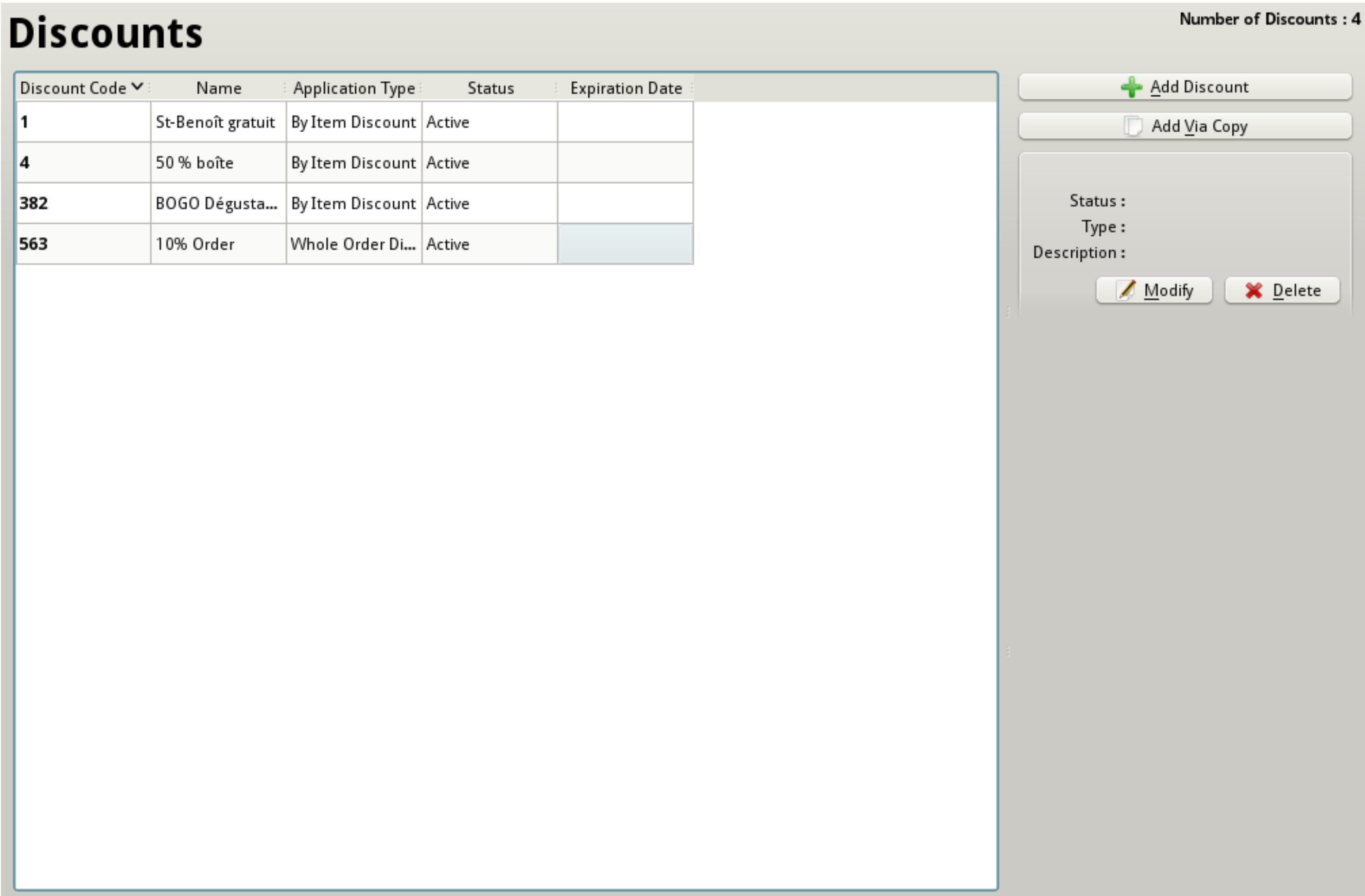


Illustration 15: The Discounts Module

The table in the center displays all the discounts. In the center-right section of the screen, informations about the currently selected discounts are displayed, along with the *Modify* and *Delete* buttons. To select a discount, click on it in the central table.

To search a discount in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a discount by its name or status. To close the search bar, click on the red X or re-press Ctrl+F.

2.7.1 Add a new discount

To add a new discount, you need to click on the Add Discount button (or press Alt+A). The following dialog will show up :

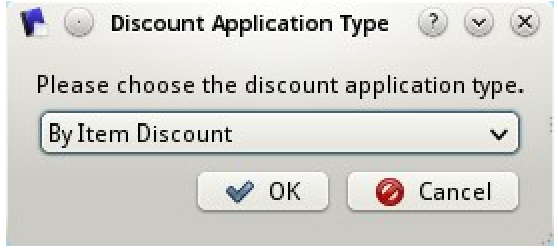


Illustration 16: Discount Application Type Dialog

You need to choose the discount application type :

- By Item Discount : The discount will be applied to one or many items of the order
- Whole Order Discount : The discount will be applied to the whole order

After you click on OK, the New Discount dialog will show up :

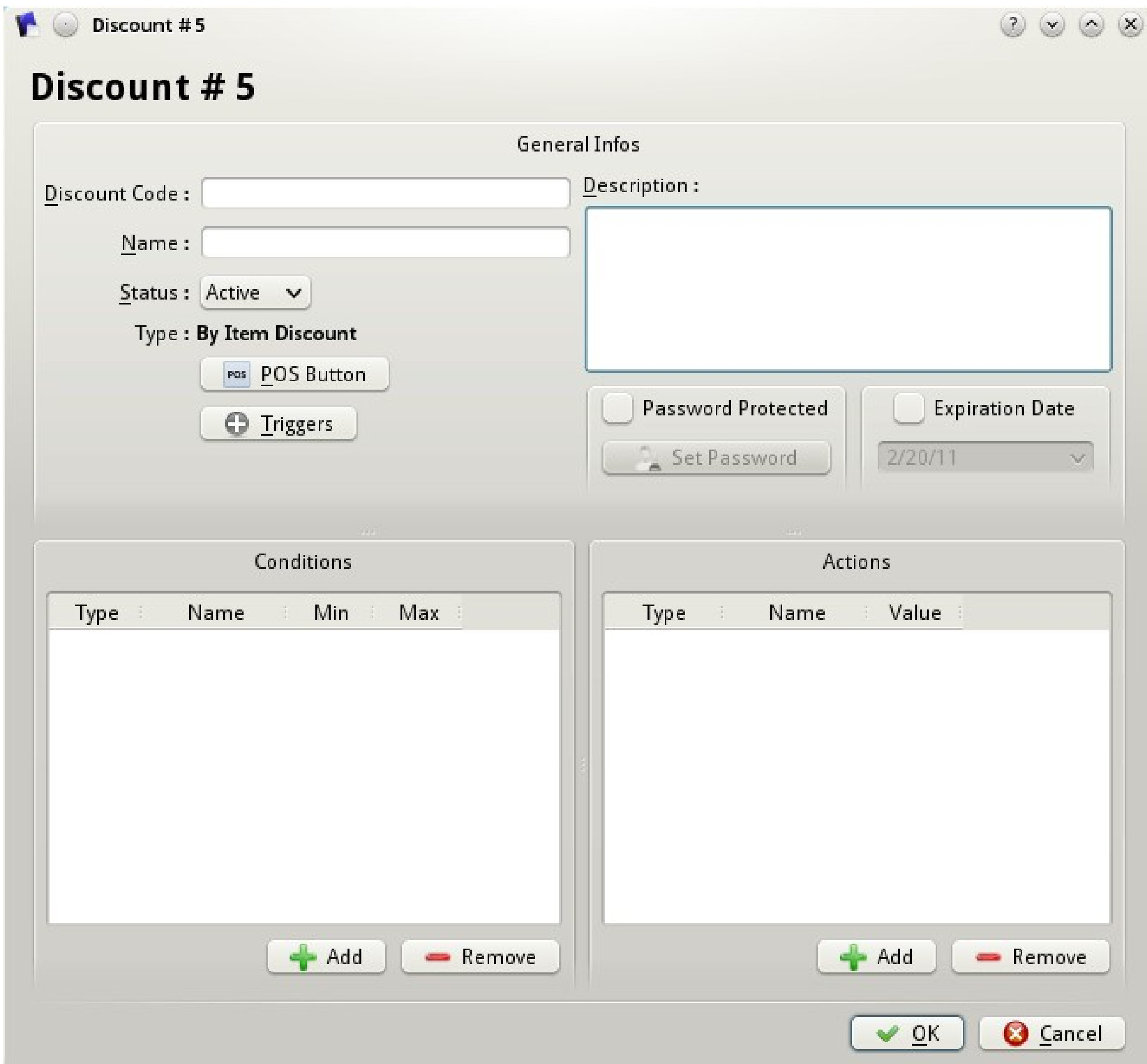


Illustration 17: New Discount Dialog

The dialog is composed of three main sections :

- General Infos : General informations about the discount. It contains the following fields :
  - Discount Code : The code of the discount. If you leave it empty, a code will be automatically generated.
  - Name : The discount's name
  - Status : The discount's status (Inactive discounts won't be available to new orders)
  - POS Button : The discount's POS button (used in POS environments)
  - Triggers : The discount triggers. A trigger is a PLU/Product/Service that is added to the order after the discount is applied. This item can have a discount on it or not. For example, if there is a trigger of 2 x PLU # 89, with a discount of 50%, 2 PLUs # 89 will be added to the order with the correct discount applied. The triggers are always added after the conditions and actions.
  - Description : The discount's description
  - Password Protected : If you set a password for the discount, it will be impossible to add the discount to an order without the correct password
  - Expiration Date : The discount's expiration date
- Conditions : The discount's conditions. All the conditions must be met before the discount can be added to an order. For example, if a discount has the condition 'PLU # 233 > 0', it will only be possible to add the discount if PLU # 233 is present at least once in the order. Note that items that already have discounts are not included in the formula. Taking our example, if PLU # 233 is in the order once, but a discount is already applied to it, it won't be possible to add the new discount.
- Actions : The discount's actions. The actions are what a discount makes to the order. For example, if an action is “PLU # 61 at 50%”, the discount applied to an order with a PLU # 61 would result in PLU # 61 being at half its price. Note that if an order didn't have any PLU # 61, the discount couldn't be applied to this order.

Add a condition

To add a condition, click on the Add button of the Conditions area, and choose the condition type in the following choices and click on OK. The New Condition dialog will show up.

- Req. Amount : An amount is required.
- Req. PLU : A specific PLU is required
- Req. PLU Category : Any PLU of a specific category is required
- Req. Product : A specific product is required
- Req. Product Category : Any product of a specific category is required
- Req. Service : A specific service is required
- Req. Any PLU : Any PLU is required. Useful if you need a minimum or a maximum quantity of items to apply the discount.

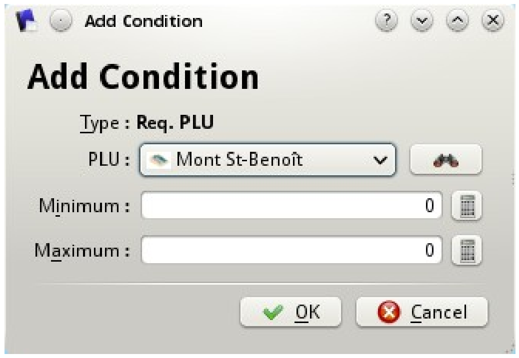


Illustration 18: New Condition Dialog

The dialog is a tad different for the different types of conditions, but the concept is the same. In the *Req. PLU, Req. PLU Category, Req. Product, Req. Product Category* and *Req. Service* types, you need to choose the required object. Then for all types, you need to select the maximum or minimum quantity/amount required. The value 0 is interpreted as none. For example, if you enter 5 as a minimum and 0 as a maximum, there won't be any maximum, but a minimum of 5.

Delete a condition

To delete a condition, simply select it and click on the Delete button of the Conditions area.

Add an action

To add an action, click on the Add button of the Actions area, and choose the action type in the following choices and click on OK. The New Action dialog will show up.

- Percentage : A percentage of the item/order. For example, if the percentage is 20% and the item's price is \$100, the price after discount will be \$80 (20% is deduced of the price).
- Price override : A new price will be applied to the item
- Fixed rebate : A fixed rebate will be applied to the PLU/Order. For example, if the fixed rebate is \$2 and the item's price is \$10, the price after discount will be \$8 (\$2 is deduced of the price).

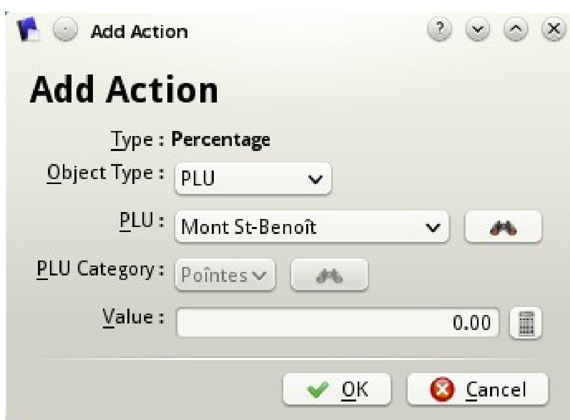


Illustration 19: New Action Dialog

The dialog is different if the discount's application type is *By Item* or *Whole Order*. In the *By Item*, you'll need to choose the object (PLU, service, category, etc.) the discount is applied to, but in the Whole Order, the discount is applied to the whole order so no choice is required. Note that you cannot add more than 1 action in a Whole Order discount. The *Value* field represents the value of the rebate (percentage, price override or fixed rebate). Click on OK to add the action.

Delete an action

To delete an action, simply select it and click on the Delete button of the Actions area.

Add a trigger

To add a trigger, you need to open the Triggers dialog by clicking on the *Triggers* button, and then click on the *Add* button. The New Trigger dialog will show up.

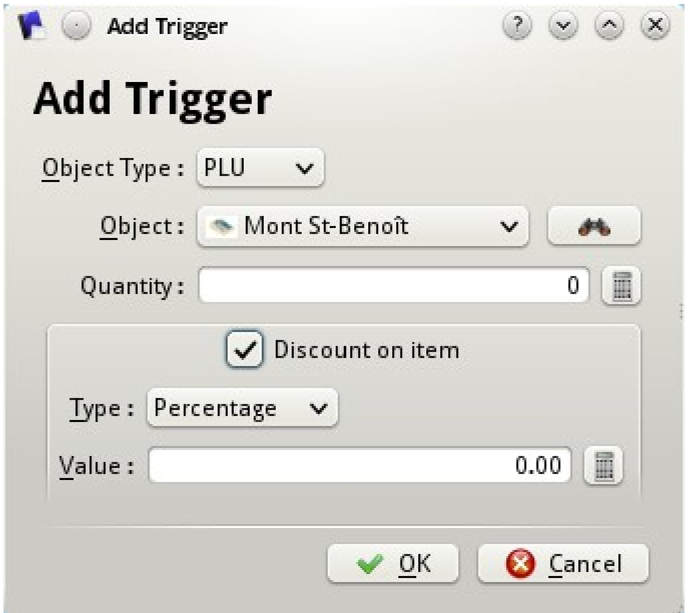


Illustration 20: New Trigger Dialog

- Object Type : The type of object added (PLU, product or service)
- Object : The object added
- Quantity : The quantity of objects to add

If you want to apply a discount on the item added by the trigger, check the *Discount On Item* box and fill the discount informations (see *Add An Action* for more informations).

Delete a trigger

To delete a trigger, simply select it in the Triggers dialog and click on the Delete button.

2.7.2 Modify a discount

To modify a discount, select it in the central table and click on the Modify button (or press Alt+M). You can also double-click on it in the central table. The *Modify Discount* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.7.3 Add via copy

To create a discount similar to one already existing, you can use the *Add Via Copy* function. It takes the current discount and creates a copy of it. You can then modify the new discount. To use this function, select a discount in the central table and click on the Add Via Copy button (or press Alt+V). The following dialog will show up :

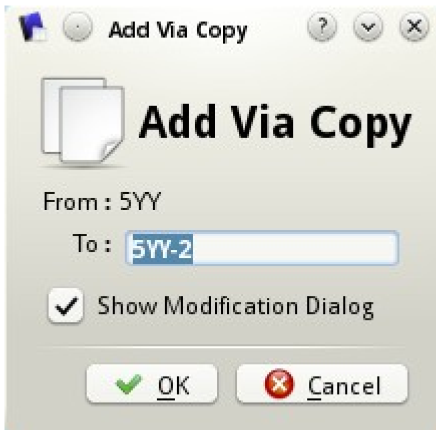


Illustration 21: Add Via Copy Dialog

2.7.4 Delete a discount

To delete a discount, select it in the central table and click on the Delete button (or press Alt+D). Note that you cannot delete discounts that are used in orders.

2.8 Orders

Orders are the purchases of the customers to your organization. To create, modify and delete orders, you need to open the Orders module (Edit > Orders or press F8).

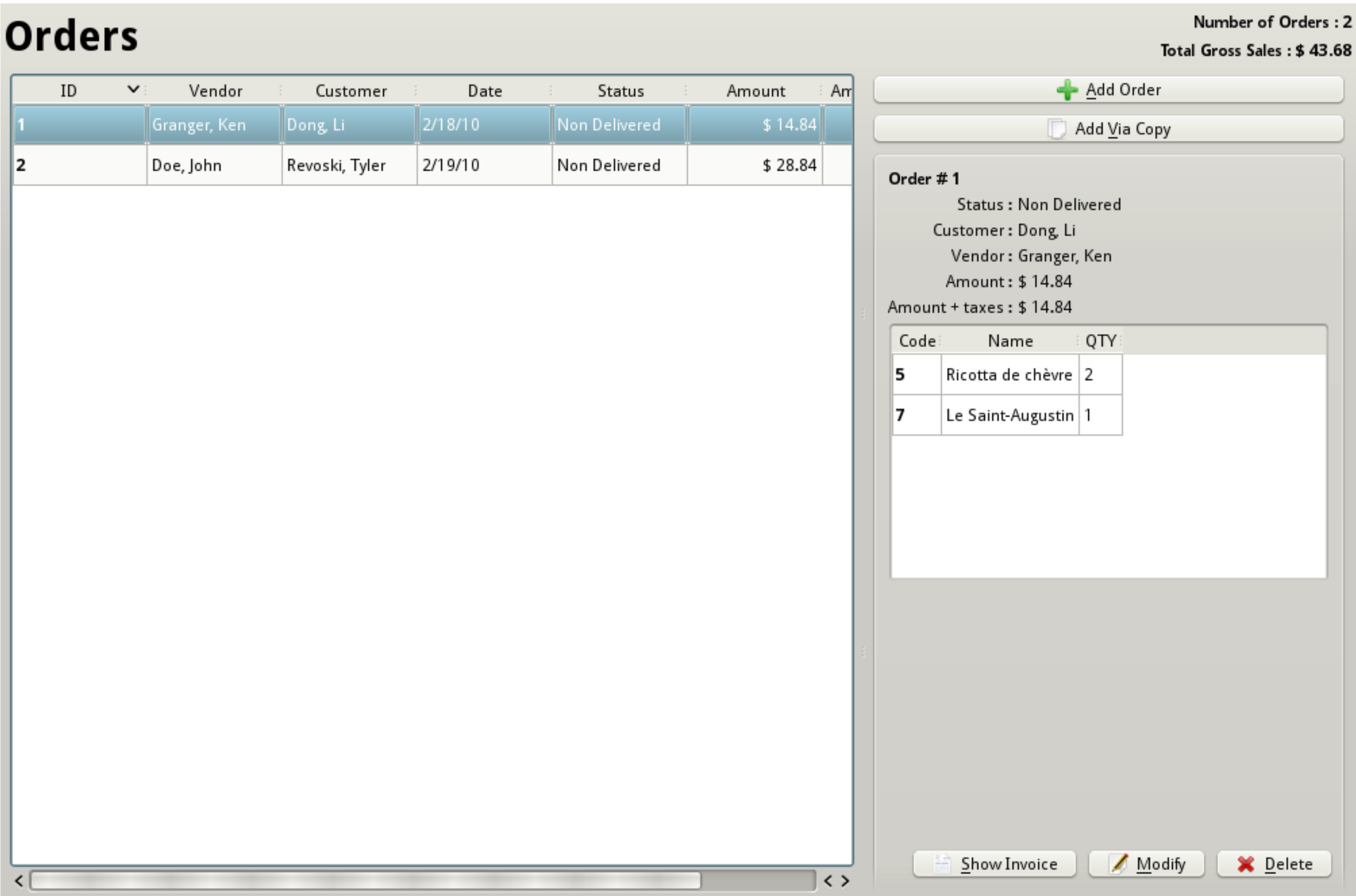


Illustration 22: The Orders Module

The table in the center displays all the orders. In the middle-right section of the screen, informations about the currently selected order are displayed, along with the *Show Invoice, Modify* and *Delete* buttons. To select an order, click on it in the central table.

To search an order in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search an order by its ID, customer, vendor or status. To close the search bar, click on the red X or re-press Ctrl+F.

2.8.1 Add a new order

To add a new order, you need to open the New Order dialog by clicking on the *Add Order* button located in the top-right section of the screen (or press Alt+A). You can also press the Add Order toolbar button, or use the global shortcut Ctrl+Alt+O. The following dialog will show up :

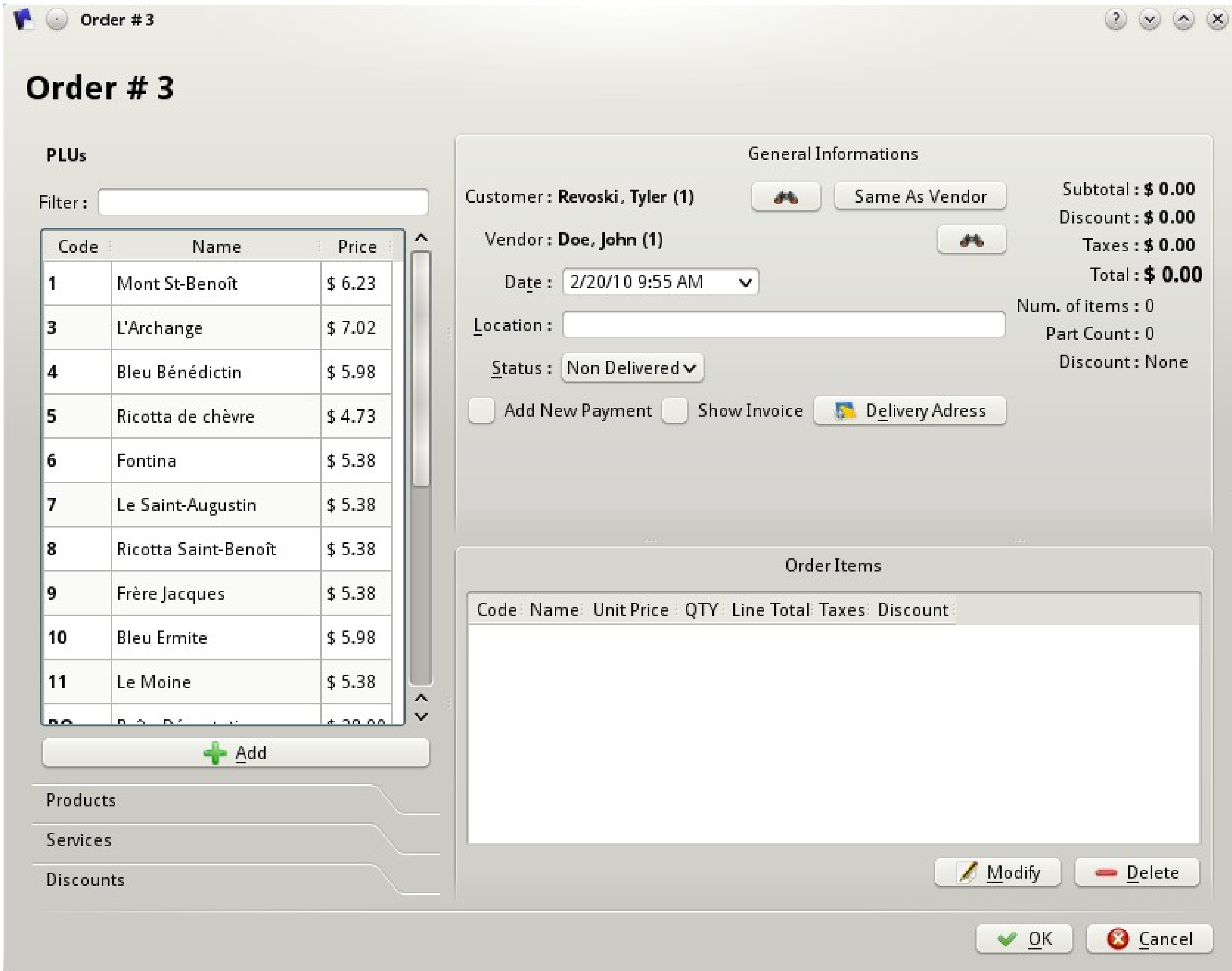


Illustration 23: New Order Dialog

The dialog contains three main sections :

- PLUs/Products/Services/Discounts section : This section allows you to add new items to the order (see section Add an Item)
- General Informations : General information about the order
  - Customer : The order's customer. It can be selected by clicking on the “binoculars” button. The customer can also be the same than the vendor if the *Same As Vendor* button is checked.
  - Vendor : The order's customer. It can be selected by clicking on the “binoculars” button.
  - Date : The order's date
  - Location : The order's location
  - Status : The order's status. When an order is delivered, it cannot be modified anymore.
  - Add New Payment : If you want to add a new payment after adding this order, check this box.

- Show Invoice : If you want to see the invoice after adding this order, check this box.
- Delivery Address : The order's delivery address. By default, it's the customer's address.
- Subtotal : The total before taxes and discounts of the order
- Discount : If a Whole Order discount is applied to the order, it will contain the discount amount.
- Taxes : If taxes are applied to this order, it will contain the total tax amount.
- Total : The total after taxes and discounts of the order.
- Num. of Items : The number of items of the order.
- Part Count : The part count of the order (if an order has 2 items, one of qty=1 and the other of qty=2, the Part Count will be 3).
- Discount : If a Whole Order discount is applied to the order, it will contain the discount's name.

• Order Items : The order items

Add an Item

To add an item, you must first select the PLU/Product/Service in the corresponding table at the left of the screen. Then, double-click on it (you can also click on the Add button or press Alt+A). The following dialog will show up :

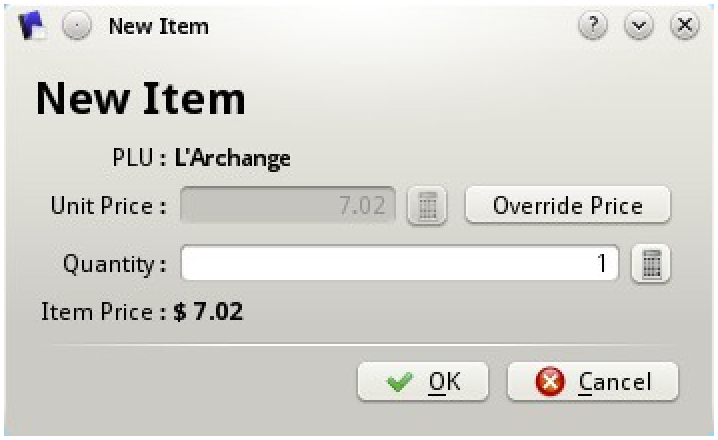


Illustration 24: New Item Dialog

Enter the required quantity and if you need to override the unit price, click on the *Override Price* button and enter the overrided unit price in the *Unit Price* field. The total item price is displayed as *Item* Price. If you're adding a product, you can select the unit in which the quantity is in the list next to the *Quantity* field. Click on OK to add the item. Note that Whole Order discounts are removed when adding an item.

Modify an Item

To modify an item, select it in the Order Items table and click on the *Modify* button (or press Alt+M). Note that Whole Order discounts are removed when modifying an item.

Delete an Item

To delete an item, select it in the Order Items table and click on the *Delete* button (or press Alt+D). Note that all discounts are removed when deleting an item.

Add a discount

To add a discount, you must first select it in the *Discounts* table at the left of the screen. Then, double-click on it (you can also click on the Add button or press Alt+A). The discount will be added to the order. Note that you can get informations about the selected discount by clicking on the *Infos* button (or by pressing Alt+I).

2.8.2 Modify an order

To modify an order, select it in the central table and click on the Modify button (or press Alt+M). You can also double-click on it in the central table. The *Modify Order* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.8.3 Add via copy

To copy an existing order, you can use the *Add Via Copy* function. It takes the current order and creates a copy of it which you can modify afterwards. To copy an order, select it in the central table and click on the Add Via Copy button (or press Alt+V). The order will be copied and the *Modify Order* dialog will show up.

2.8.4 Show Invoice

To view or print the invoice of an order, select it in the central table and click on the Show Invoice button (or press Alt+S).

2.8.5 Delete an order

To delete an order, select it in the central table and click on the Delete button (or press Alt+D).

2.9 Deliveries

Deliveries are the purchases of your organization to the suppliers. To create, modify and delete deliveries, you need to open the Deliveries module (Edit > Deliveries or press F9).

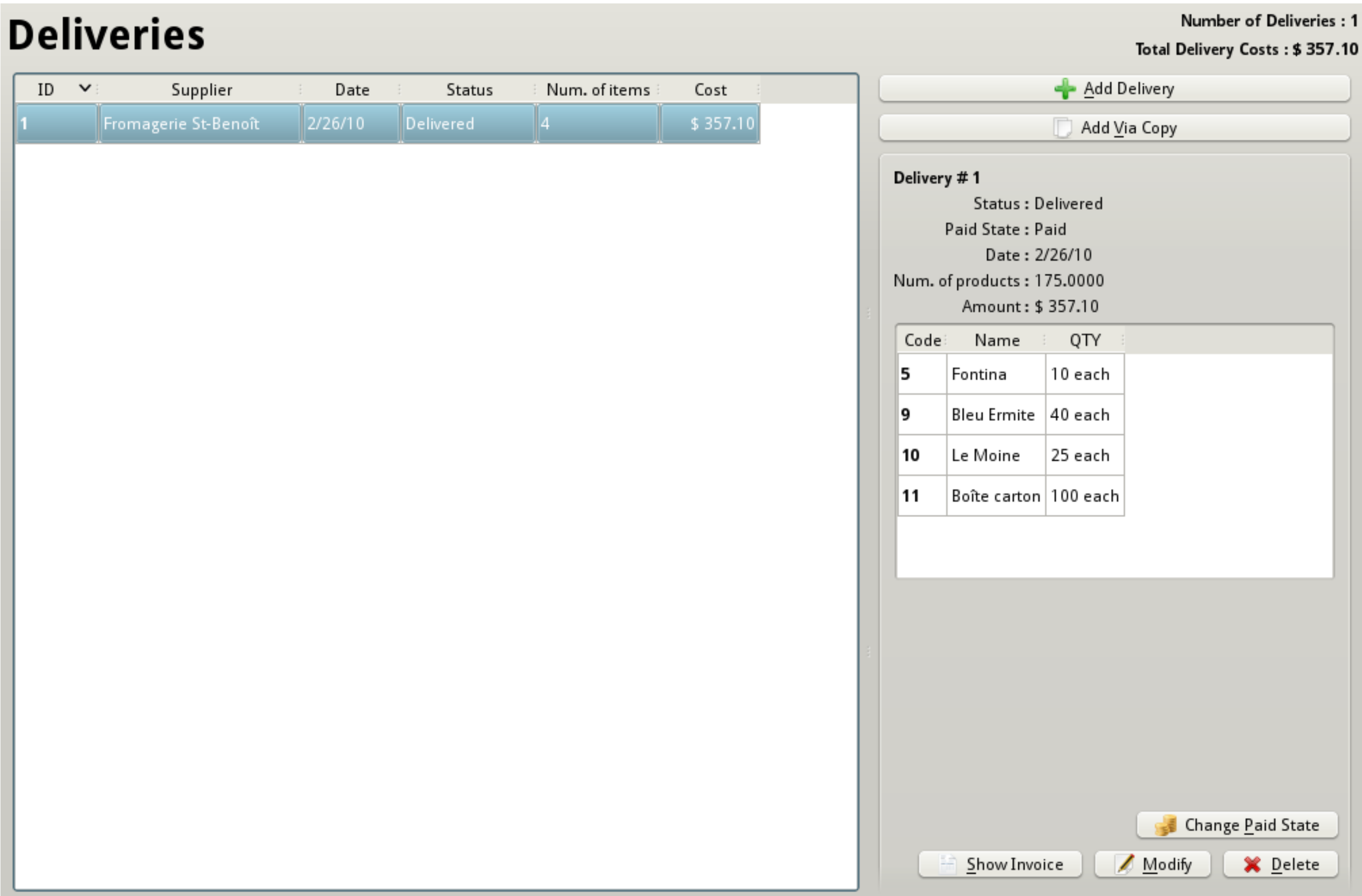


Illustration 25: The Deliveries Module

The table in the center displays all the deliveries. In the middle-right section of the screen, informations about the currently selected delivery are displayed, along with the *Change Paid State*, *Show Invoice, Modify* and *Delete* buttons. To select a delivery, click on it in the central table.

To search a delivery in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a delivery by its ID, supplier or status. To close the search bar, click on the red X or re-press Ctrl+F.

2.9.1 Add a new delivery

To add a new delivery, you need to open the New Delivery dialog by clicking on the *Add Delivery* button located in the top-right section of the screen (or press Alt+A). You can also press the Add Delivery toolbar button, or use the global shortcut Ctrl+Alt+D. After choosing the delivery's supplier, the following dialog will show up :

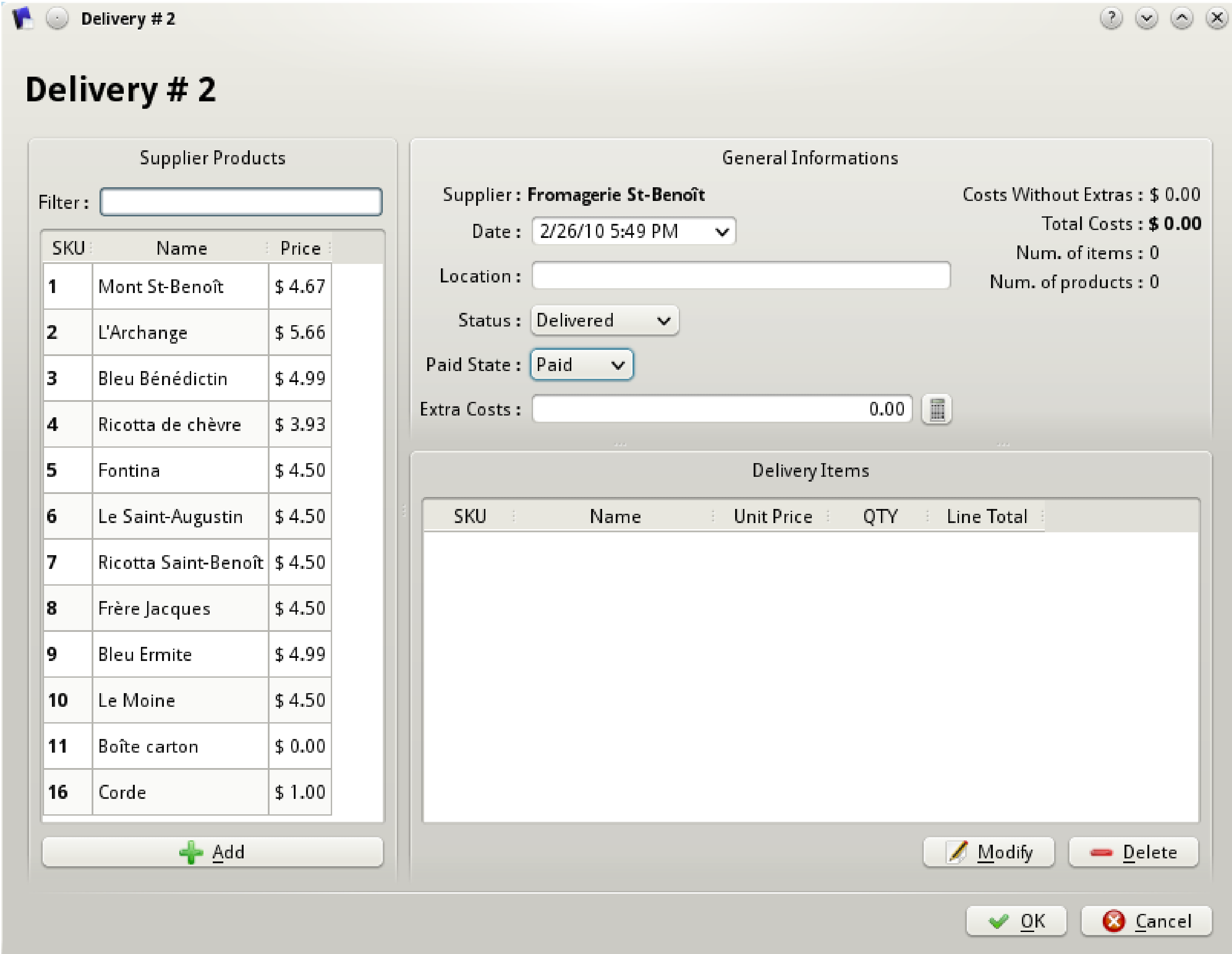


Illustration 26: New Delivery Dialog

The dialog contains three main sections :

- Supplier Products section : This section allows you to add new items to the order (see section Add an Item). It contains all of the supplier's products.
- General Informations : General information about the delivery
  - Supplier : The delivery's supplier
  - Date : The delivery's date
  - Location : The delivery's location
  - Status : The delivery's status. When a delivery is delivered, it cannot be modified anymore.
  - Paid State : Unpaid deliveries are not calculated in the *Total Delivery Costs.*
  - Extra Costs : If the delivery has extra costs, such ad shipping costs, enter them here.
  - Costs Without Extras : The total costs before extras.

  - Total Costs : The total costs with extras.
  - Num. of Items : The number of items of the delivery.
  - Num. of Products : The number of products of the delivery (if a delivery has 2 items, one of qty=1 and the other of qty=2.5, the *Num. of Products* will be 3.5).
- Delivery Items : The order items

Add an Item

To add an item, you must first select the product in the table at the left of the screen. Then, double-click on it (you can also click on the Add button or press Alt+A). The following dialog will show up :

Illustration 27: New Item Dialog

Enter the required quantity and if you need to override the unit price, click on the *Override Price* button and enter the overrided unit price in the *Unit Price* field. The total item price is displayed as *Item* Price. You can select the unit in which the quantity is in the list next to the *Quantity* field. Click on OK to add the item. Note that the quantity will be converted to the product's default unit if a different unit is chosen.

Modify an Item

To modify an item, select it in the Delivery Items table and click on the *Modify* button (or press Alt+M).

Delete an Item

To delete an item, select it in the Delivery Items table and click on the *Delete* button (or press Alt+D).

2.9.2 Modify a delivery

To modify a delivery, select it in the central table and click on the Modify button (or press Alt+M). You can also double-click on it in the central table. The *Modify Delivery* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.9.3 Add via copy

To copy an existing delivery, you can use the *Add Via Copy* function. It takes the current delivery and creates a copy of it which you can modify afterwards. To copy a delivery, select it in the central table and click on the Add Via Copy button (or press Alt+V). The delivery will be copied and the *Modify Order* dialog will show up.

2.9.4 Show Invoice

To view or print the invoice of a delivery, select it in the central table and click on the Show Invoice button (or press Alt+S).

2.9.5 Delete a delivery

To delete a delivery, select it in the central table and click on the Delete button (or press Alt+D).

2.10 Payment Modes

Payment modes are used in payments, donations, expenses and cash adjustments. To create, modify and delete payment modes, you need to open the Payment Modes module (Edit > Payment Modes or press Shift+F10).

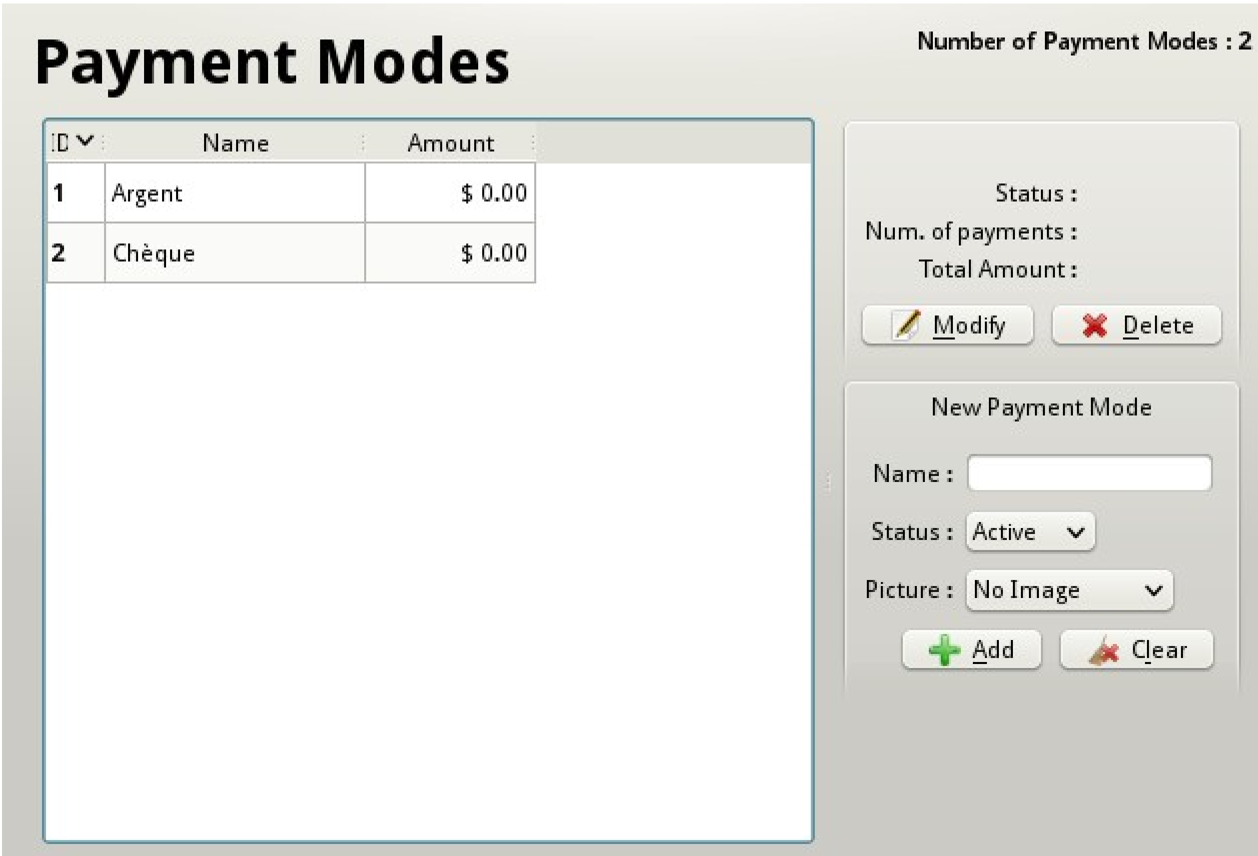


Illustration 28: The Payment Modes Module

The table in the center displays all the payment modes. In the top-right section of the screen, informations about the currently selected payment mode is displayed, along with the *Modify* and *Delete* buttons. To select a payment mode, click on it in the central table. The Amount column of the table represent the total amount collected for each payment mode.

To search a payment mode in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a payment mode by its name or ID. To close the search bar, click on the red X or re-press Ctrl+F.

2.10.1 Add a new payment mode

To add a new payment mode, you need to fill the New Payment Mode area in the bottom-right section of the screen, and click on Add (or press Alt+A). To clear the New Payment Mode area, click on the Clear button (or press Alt+L).

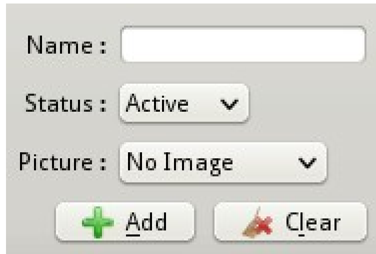


Illustration 29: New Payment Mode Area

Name : The payment mode's name

Status : The payment mode's status (Inactive payment modes cannot be selected when adding new payments, expenses, cash adjustments or donations).

Picture : The payment mode's icon (Used in payment modes drop-down lists).

2.10.2 Modify a payment mode

To modify a payment mode, select it in the central table and click on the Modify button (or press Alt+M). You can also double-click on it in the central table. The *Modify Payment Mode* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.10.3 Delete a payment mode

To delete a payment mode, select it in the central table and click on the Delete button (or press Alt+D). Note that you cannot delete taxes that are used in payments, expenses, cash adjustments or donations.

2.11 Payments

Payments are how customers pay for their orders. To create, modify and delete payments, you need to open the Payments module (Edit > Payments or press F10).

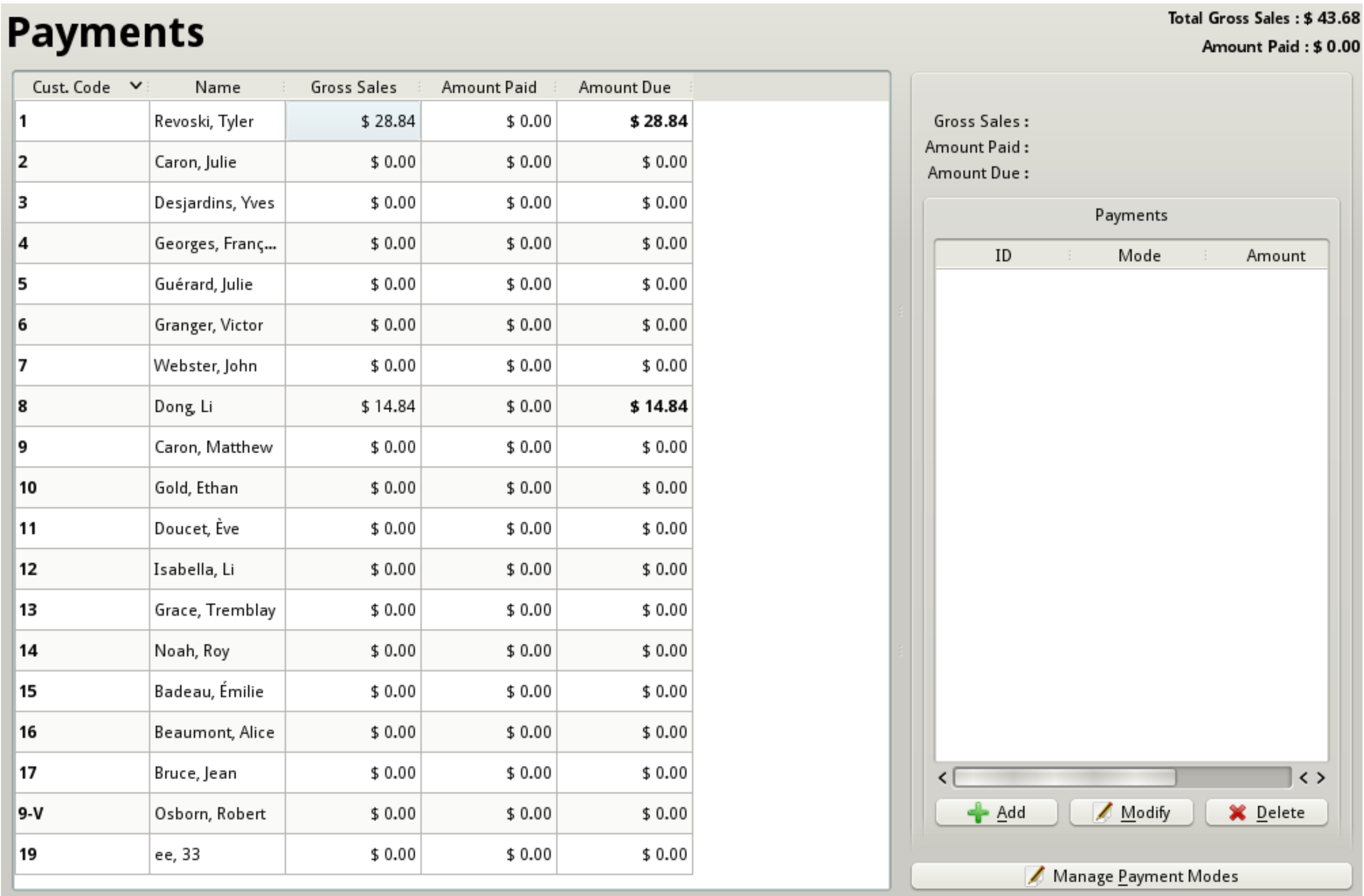


Illustration 30: The Payments Module

The table in the center displays all the customers, with their gross sales, amount paid and amount due. When a customer is selected, he right section of the screen contains all his payments, along with the *Add, Modify* and *Delete* buttons.

To search a customer in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a customer by its name, first name or ID. To close the search bar, click on the red X or re-press Ctrl+F.

2.11.1 Add a new payment

To add a new payment, select a customer and click on the *Add* button (or press Alt+A). The following dialog will show up :

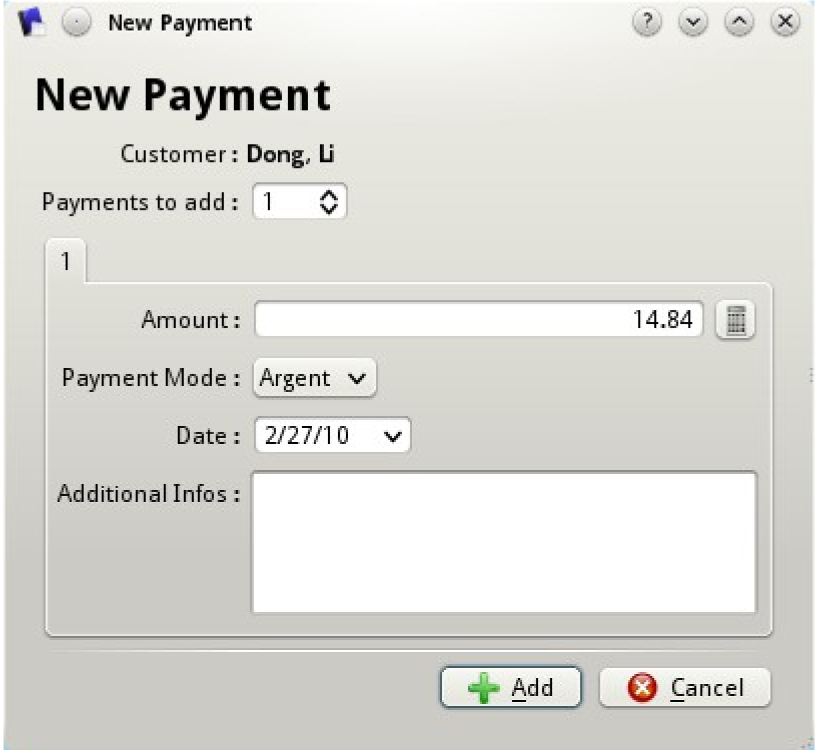


Illustration 31: The New Payment Dialog

Select the number of payments to add in the *Payments to add* box. Each payment is in a separate tab. You need to enter the following informations for all the payments to add :

Amount : The payment's amount

Payment Mode : The payment mode to use

Date : The payment's date

Additional Infos : Additional informations about the payment, such as the check number.

To complete the operation, click on the Add button (or press Alt+A). The payment(s) will be added.

2.11.2 Modify a payment

To modify a payment, select it in the right table and click on the Modify button (or press Alt+M). You can also double-click on it in the right table. The *Modify Payment* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.11.3 Delete a payment

To delete a payment, select it in the right table and click on the Delete button (or press Alt+D).

2.12 Donators

Donators are the people who make the donations in the campaign (note that customers can also be used as donators). To create, modify and delete donators, you need to open the Donators module (Edit > Donators or press Shift+F3).

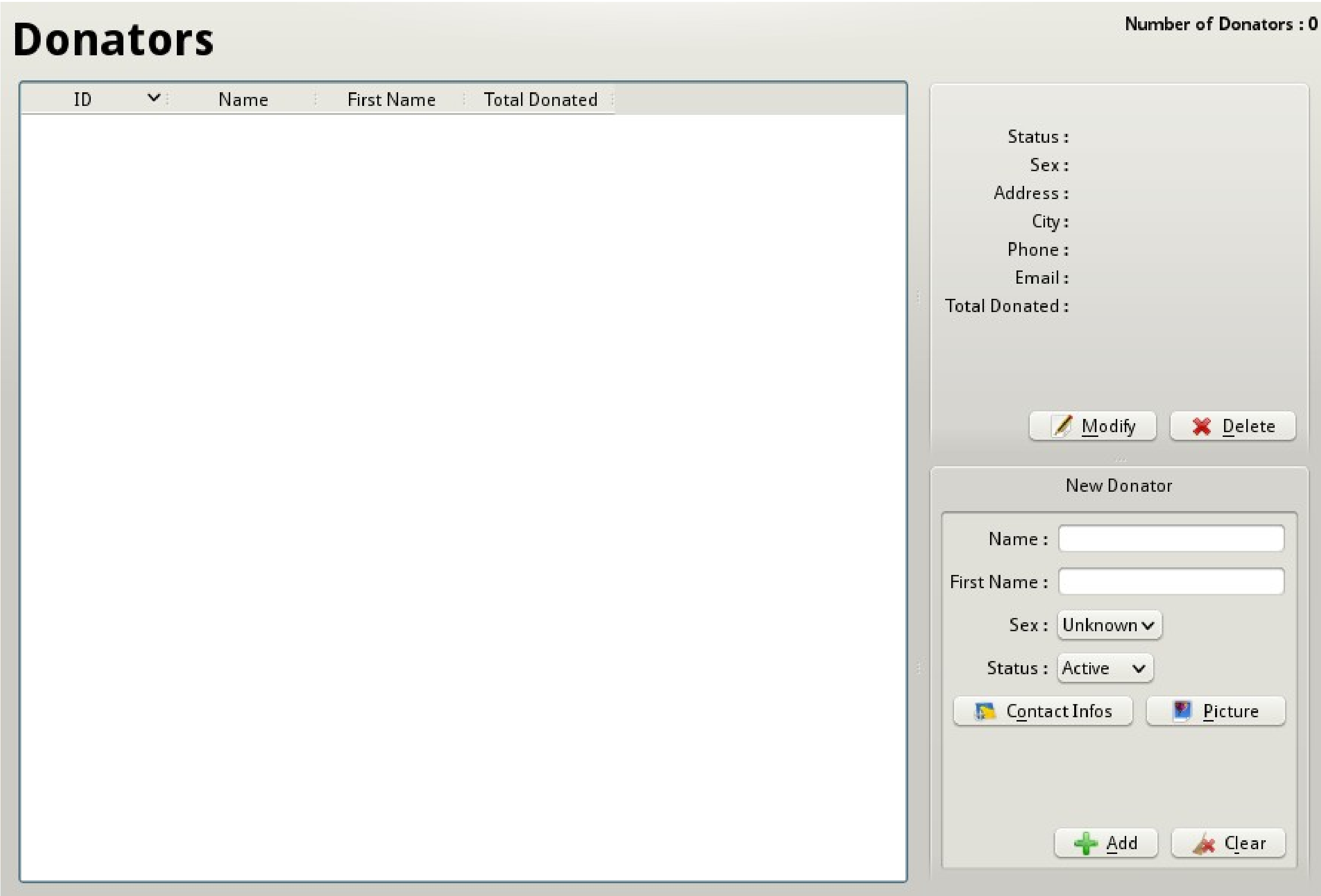


Illustration 32: The Donators Module

The table in the center displays all the donators, with their total donated amount. The top-right section of the screen contains informations about the currently selected donator, with the *Modify* and *Add* buttons. To select a donator, click on it in the central table.

To search a donator in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a donator by its name, first name or ID. To close the search bar, click on the red X or re-press Ctrl+F.

2.12.1 Add a new donator

To add a new payment mode, you need to fill the New Payment Mode area in the bottom-right section of the screen, and click on Add (or press Alt+A). To clear the New Payment Mode area, click on the Clear button (or press Alt+L).

Illustration 33: New Donator Area

Name : The donator's name

First Name : The donator's first name

Sex : The donator's sex

Status : The donator's status (Inactive vendors cannot make new donations)

Contact Infos : The donator's contact informations and address

Picture : A picture of the donator (can be used in reports)

2.12.2 Modify a donator

To modify a donator, select it in the right table and click on the Modify button (or press Alt+M). You can also double-click on it in the right table. The *Modify Donator* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.12.3 Delete a donator

To delete a donator, select it in the right table and click on the Delete button (or press Alt+D). Note that you cannot delete donators who made donations.

2.13 Donations

Donators and customers can make donations to your organization. To create, modify and delete donations, you need to open the Donations dialog (Edit > Donations or press Ctrl+Shift+D).

Illustration 34: The Donations Dialog

The table in the center displays all the donations. The *Who* column contains the name of the person who made the donation (customer or donator).

To search a donation in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a donation by its ID or Who. To close the search bar, click on the red X or re-press Ctrl+F.

2.13.1 Add a new donation

To add a new donation, click on the *Add* button (or press Alt+A). The following dialog will show up :

Illustration 35: The New Donation Dialog

Fill the dialog and click on *Add* to add the donation. To select the customer/donator who made the donation, click on the *Select Who* button (or press Alt+W).

Amount : The donation amount

Payment Mode : The payment mode to use

Date : The donation's date

Additional Infos : Additional informations about the donation, such as the check number.

2.13.2 Modify a donation

To modify a donation, select it in the table and click on the Modify button (or press Alt+M). You can also double-click on it in the table. The *Modify Donation* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.13.3 Delete a donation

To delete a donation, select it in the right table and click on the Delete button (or press Alt+D).

2.14 Other Expenses

If you have additional expenses such as salary, electricity, rent, etc, you can enter it as an Expense. To create, modify and delete expenses, you need to open the Expenses dialog (Edit > Other Expenses or press Ctrl+Shift+E).

Illustration 36: The Expenses Dialog

The table in the center displays all the expenses. To search an expense in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search an expense by its ID. To close the search bar, click on the red X or re-press Ctrl+F.

2.14.1 Add a new expense

To add a new expense, click on the *Add* button (or press Alt+A). The following dialog will show up :

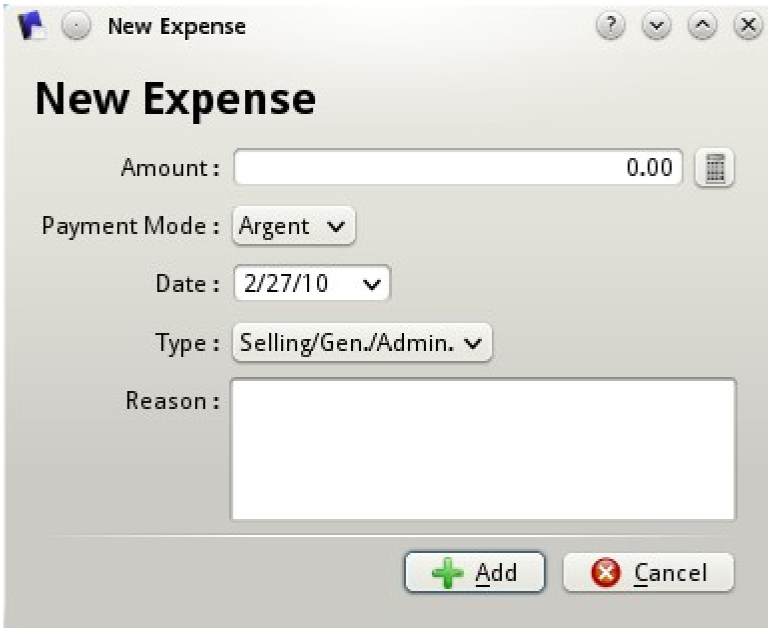


Illustration 37: The New Expense Dialog

Fill the dialog and click on *Add* to add the expense.

Amount : The expense amount

Payment Mode : The payment mode to use

Date : The expense's date

Type : The type of the expense

Reason : The reason for the expense

2.14.2 Modify an expense

To modify an expense, select it in the table and click on the Modify button (or press Alt+M). You can also double-click on it in the table. The *Modify Expense* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.14.3 Delete an expense

To delete an expense, select it in the table and click on the Delete button (or press Alt+D).

2.15 Stock Adjustments

To adjust the stock of a product (ex : spoiled food), you need to use stock adjustments. To manage stock adjustments, you need to open the Stock Adjustments dialog (Edit > Stock Adjustments or press Ctrl+Shift+K).

Illustration 38: The Stock Adjustments Dialog

The left table contains all the products, while the right table contains all the stock adjustments for the selected product.

2.15.1 Add a new adjustment

To add a new stock adjustment, select a product and click on the *Add Adjustment* button (or press Alt+A). The following dialog will show up :

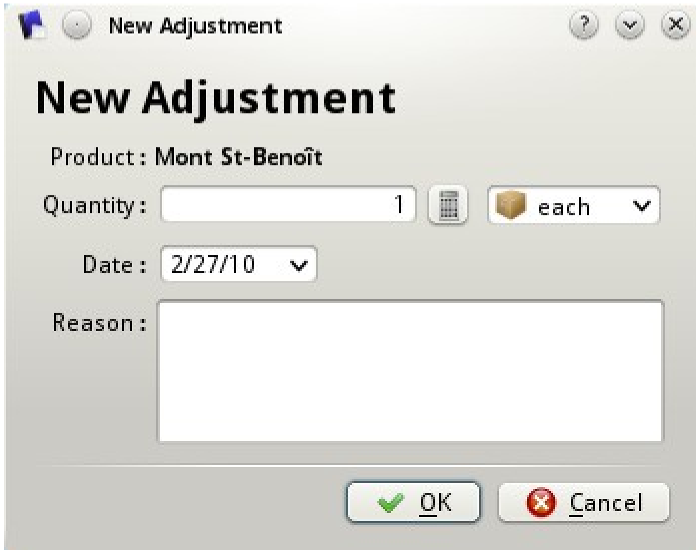


Illustration 39: The New Adjustment Dialog

Fill the dialog and click on *Add* to add the adjustment.

Amount : The adjustment's quantity and the unit in which the quantity is. It can be positive (products are added) or negative (products are removed)

Date : The adjustment's date

Reason : The reason for the adjustment

2.15.2 Cancel an adjustment

To cancel an adjustment, select it in the right table and click on the *Cancel* button (or press Alt+L). A new adjustment with the opposite quantity will be created.

2.16 Units

Many units are included by default in CAMSEG SCM, but it's also possible to define custom units. To create, modify and delete units, you need to open the Units dialog (Edit > Units or press Ctrl+Shift+U).

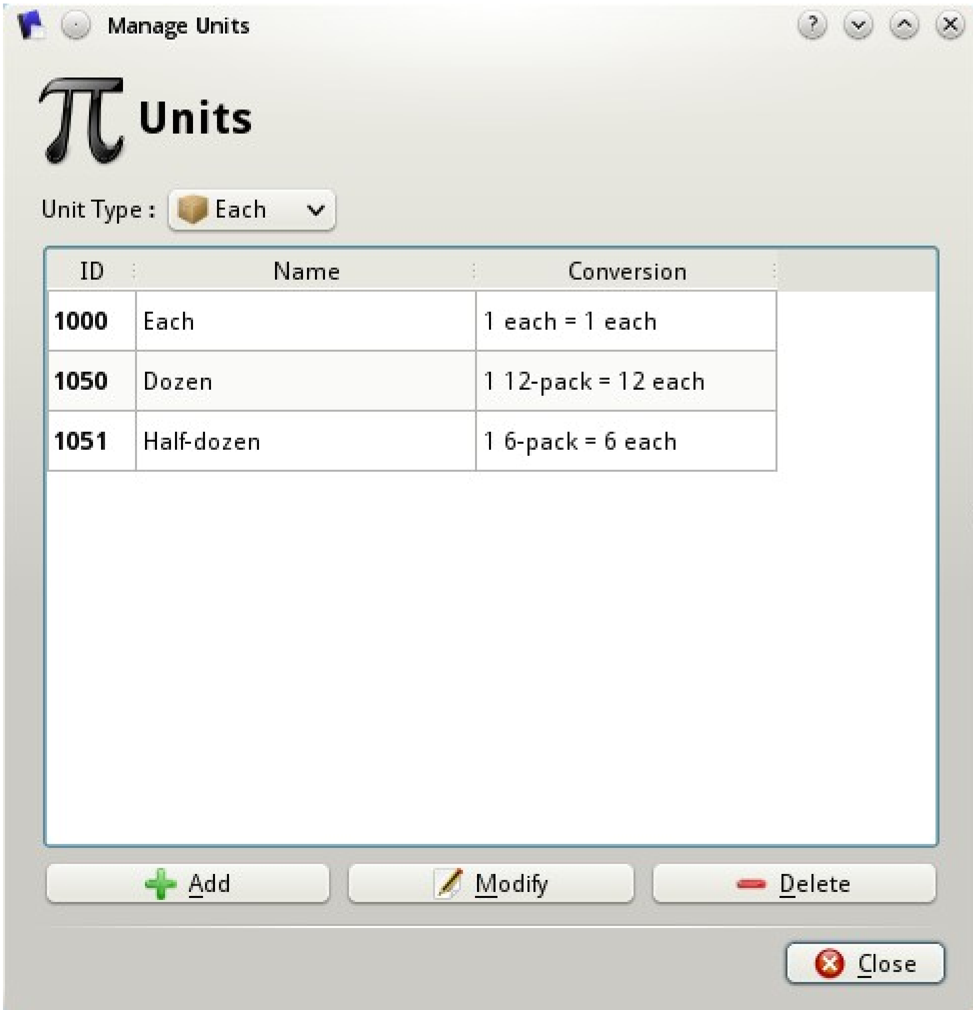


Illustration 40: The Units Dialog

The table in the center displays all the units of the type selected in the drop-down list above. The units with an ID greater or equal at 1000 are the default CAMSEG SCM units. They cannot be modified or removed.

There are five types of units, and a base unit for each. The conversions from an unit to another are based on the base unit :

- Each : Base unit is *Each*
- Length : Base unit is *Metre*
- Surface : Base unit is *Squar Metre*
- Volume : Base unit is *Litre*
- Mass : Base unit is *Kilogram*

2.16.1 Add a new unit

To add a new expense, click on the *Add* button (or press Alt+A). The following dialog will show up :

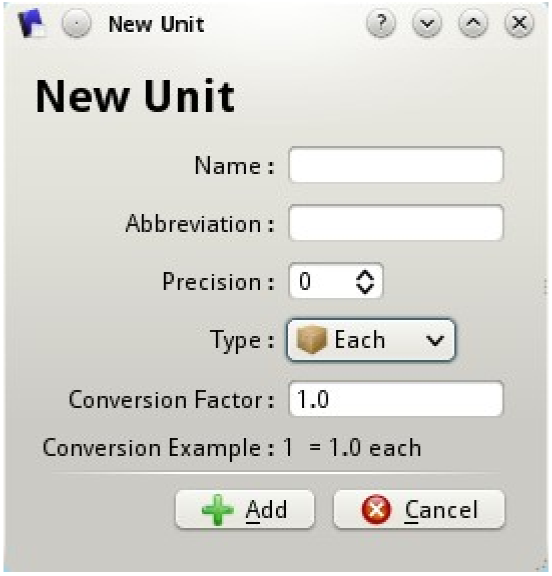


Illustration 41: The New Unit Dialog

Fill the dialog and click on *Add* to add the unit.

Name : The name of the unit

Abbreviation : An abbreviation of the unit (ex : for *Metre*, the abbreviation is *m).*

Precision : The number of decimals to use when formatting a quantity in this unit (for *Each*, it's 0, while for *Metre*, it's 4).

Type : The type of the unit

Conversion Factor : The conversion factor to the base unit of the type

Conversion Example : An example of a conversion to the base unit

2.16.2 Modify a unit

To modify a unit, select it in the table and click on the Modify button (or press Alt+M). You can also double-click on it in the table. The *Modify Unit* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

2.16.3 Delete a unit

To delete a unit, select it in the table and click on the Delete button (or press Alt+D).

2.17 Users

Different user accounts can be created to open the campaign. To create, modify and delete users, you need to open the Users dialog (Campaign > Users). Note that only an administrator can manage the users.

Illustration 42: The Users Dialog

All the users are displayed in the central table. To search a user in the table, press Ctrl+F. A search bar will appear at the bottom of the table. You can search a user by its ID or username. To close the search bar, click on the red X or re-press Ctrl+F.

2.17.1 Add a new user

To add a new user, click on the *Add* button (or press Alt+A). The following dialog will show up :

Illustration 43: The New User Dialog

Fill the dialog and click on *Add* to add the user.

Name : The user's name

First Name : The user's first name

Username : The username used by the user on the campaign login

Password : The password used by the user on the campaign login (confirm it in *Repeat Password)*

Type : The user's type as shown in Table 1

Admin	User	Visitor
Can perform all operations, access and modify any campaign data	Can view and modify campaign data depending on allowed permissions but cannot create new users	Can only view but not modify campaign data
Has all permissions and cannot have customized permissions	Has variable permissions depending on which permissions are allowed for the particular user	Has no permissions to modify campaign data and cannot have customized permissions

Table 1: Types of users

Permissions : Click on the *Permissions* button to assign different permissions when the new user is of type User (refer to Table 1). Select the permissions to be allowed from the *Permissions* dialog (Illustration 44).

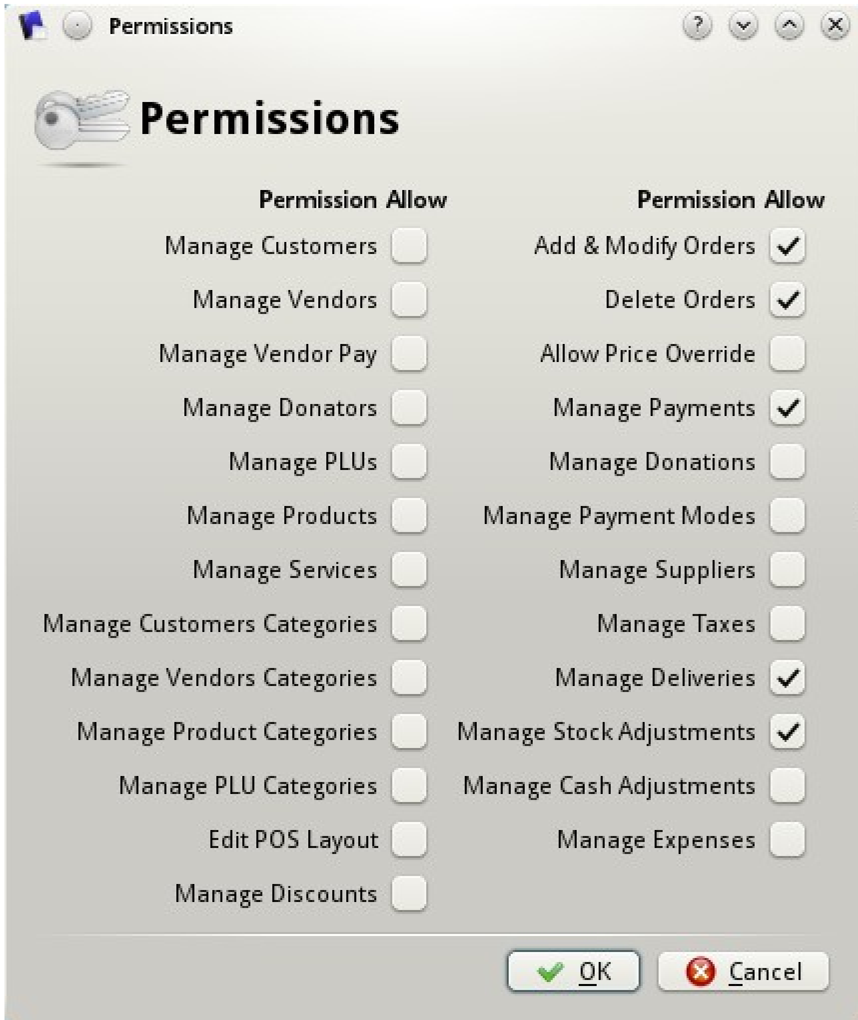


Illustration 44: The User Permissions Dialog

2.17.2 Modify a user

To modify a user, select it in the table and click on the Modify button (or press Alt+M). You can also double-click on it in the table. The *Modify User* dialog will show up. Make the modifications and click on *OK*, or click on *Cancel* to cancel the changes.

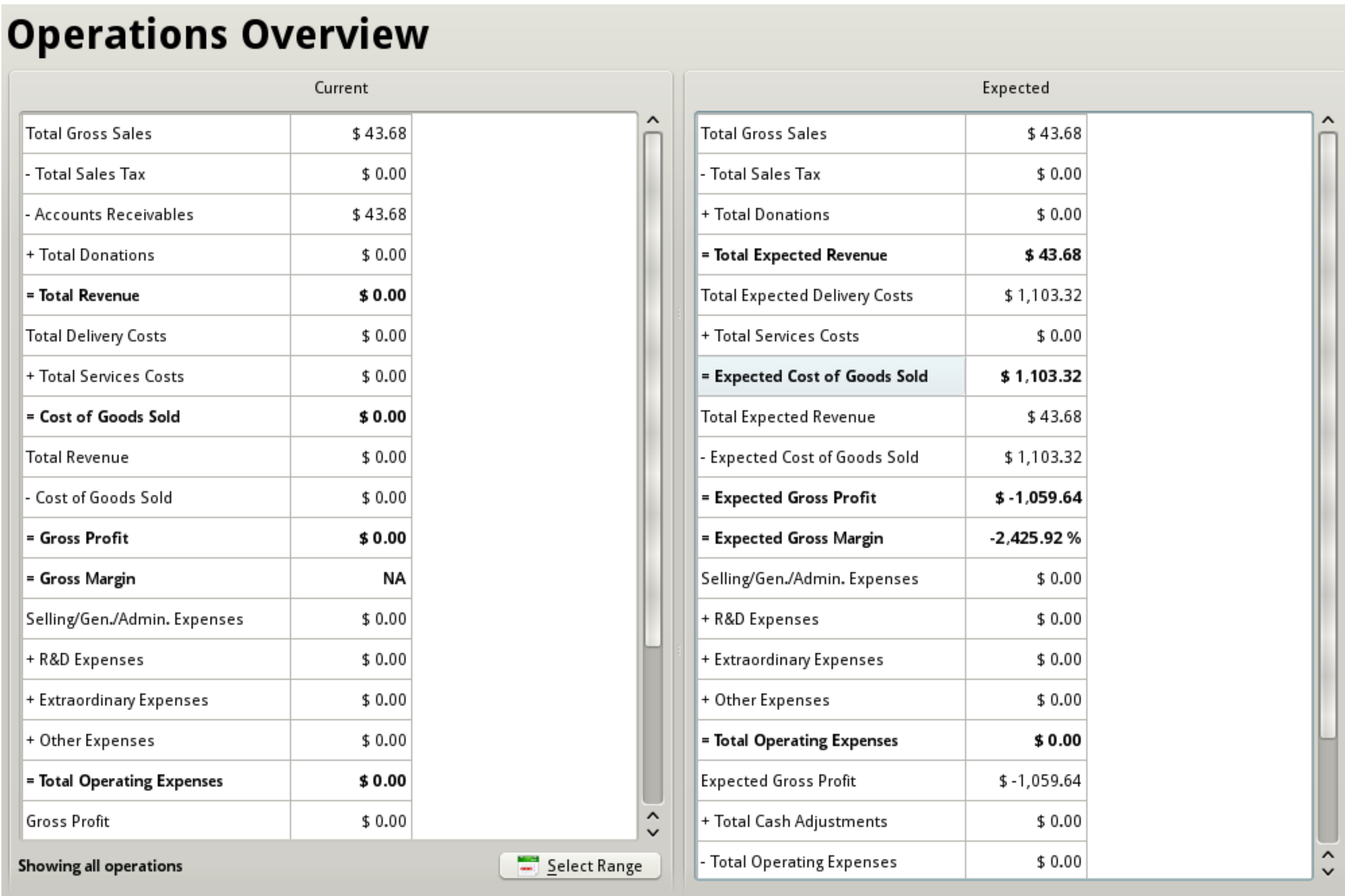
2.17.3 Delete a user

To delete a user, select it in the table and click on the Delete button (or press Alt+D). Note that you cannot delete the current user, and you need to have at least one administrator.

Chapter 3 – Sales Overview, Reports and Charts

3.1 Operations Overview

The Operations Overview module presents a summary of the campaign finances. To access it, open the Campaign > Operations Overview menu or press Ctrl+Shift+O.



Operations Overview

Current

Total Gross Sales	$ 43.68
- Total Sales Tax	$ 0.00
- Accounts Receivables	$ 43.68
+ Total Donations	$ 0.00
= Total Revenue	**$ 0.00**
Total Delivery Costs	$ 0.00
+ Total Services Costs	$ 0.00
= Cost of Goods Sold	**$ 0.00**
Total Revenue	$ 0.00
- Cost of Goods Sold	$ 0.00
= Gross Profit	**$ 0.00**
= Gross Margin	**NA**
Selling/Gen./Admin. Expenses	$ 0.00
+ R&D Expenses	$ 0.00
+ Extraordinary Expenses	$ 0.00
+ Other Expenses	$ 0.00
= Total Operating Expenses	**$ 0.00**
Gross Profit	$ 0.00

Showing all operations Select Range

Expected

Total Gross Sales	$ 43.68
- Total Sales Tax	$ 0.00
+ Total Donations	$ 0.00
= Total Expected Revenue	**$ 43.68**
Total Expected Delivery Costs	$ 1,103.32
+ Total Services Costs	$ 0.00
= Expected Cost of Goods Sold	**$ 1,103.32**
Total Expected Revenue	$ 43.68
- Expected Cost of Goods Sold	$ 1,103.32
= Expected Gross Profit	**$ -1,059.64**
= Expected Gross Margin	**-2,425.92 %**
Selling/Gen./Admin. Expenses	$ 0.00
+ R&D Expenses	$ 0.00
+ Extraordinary Expenses	$ 0.00
+ Other Expenses	$ 0.00
= Total Operating Expenses	**$ 0.00**
Expected Gross Profit	$ -1,059.64
+ Total Cash Adjustments	$ 0.00
- Total Operating Expenses	$ 0.00

Illustration 45: The Operations Overview Module

There are two main sections : Current and Expected. The *Current* table presents the financial summary as of today, while the *Expected* table presents the expected financial summary (with all deliveries paid and delivered, all payments made, etc.). See Table 2 and Table 3 for more a detailed description of all items.

The *Current* table can be restricted to a certain date interval by clicking on the *Select Range* button. If a range is defined, only the operations made in the selected range will be displayed.

Item	Description
Total Gross Sales	Total amount of all orders
Total Sales Tax	Total sales tax
Accounts Receivables	Total amount due by the customers
Total Donations	Total amount donated
Total Revenue	Total Gross Sales – (Total Sales Tax + Accounts Receivables + Total Donations)
Total Delivery Costs	Total amount of all paid deliveries
Total Services Costs	Total cost of all services
Cost Of Goods Sold	Total Delivery Costs + Total Services Costs
Gross Profit	Total Revenue - Cost Of Goods Sold
Gross Margin	Gross Profit ÷ Total Revenue
Selling/Gen./Admin. Expenses	Total amount of all SGA expenses
R&D Expenses	Total amount of all R&D expenses
Other Expenses	Total amount of all Other expenses
Extraordinary Expenses	Total amount of all Extraordinary expenses
Total Operating Expenses	Total amount of all expenses
Total Cash Adjustments	Total amount of all cash adjustments
Operating Income	Total Revenue + Total Cash Adjustments - Total Operating Expenses
Operating Margin	Operating Income ÷ Total Revenue

Table 2: Current Financial Summary Items

Item	Description
Total Gross Sales	Total amount of all orders
Total Sales Tax	Total sales tax
Total Donations	Total amount donated
Total Expected Revenue	Total Gross Sales – (Total Sales Tax + Total Donations)
Total Expected Delivery Costs	Total amount of all deliveries
Total Services Costs	Total cost of all services
Expected Cost Of Goods Sold	Total Expected Delivery Costs + Total Services Costs
Expected Gross Profit	Total Expected Revenue - Expected Cost Of Goods Sold
Expected Gross Margin	Expected Gross Profit ÷ Total Expected Revenue
Selling/Gen./Admin. Expenses	Total amount of all SGA expenses
R&D Expenses	Total amount of all R&D expenses
Other Expenses	Total amount of all Other expenses
Extraordinary Expenses	Total amount of all Extraordinary expenses
Total Operating Expenses	Total amount of all expenses
Total Cash Adjustments	Total amount of all cash adjustments
Expected Operating Income	Total Expected Revenue + Total Cash Adjustments - Total Operating Expenses
Expected Operating Margin	Expected Operating Income ÷ Expected Total Revenue

Table 3: Expected Financial Summary Items

3.2 Inventory

The Inventory module contains inventory informations, such as *Actual Stock, Expected Required Stock* of all the products (see Table 5 and Table 6 for more informations about the meaning of these items. The module can be accessed with the Campaign > Inventory menu or by pressing Ctrl+Shift+I.

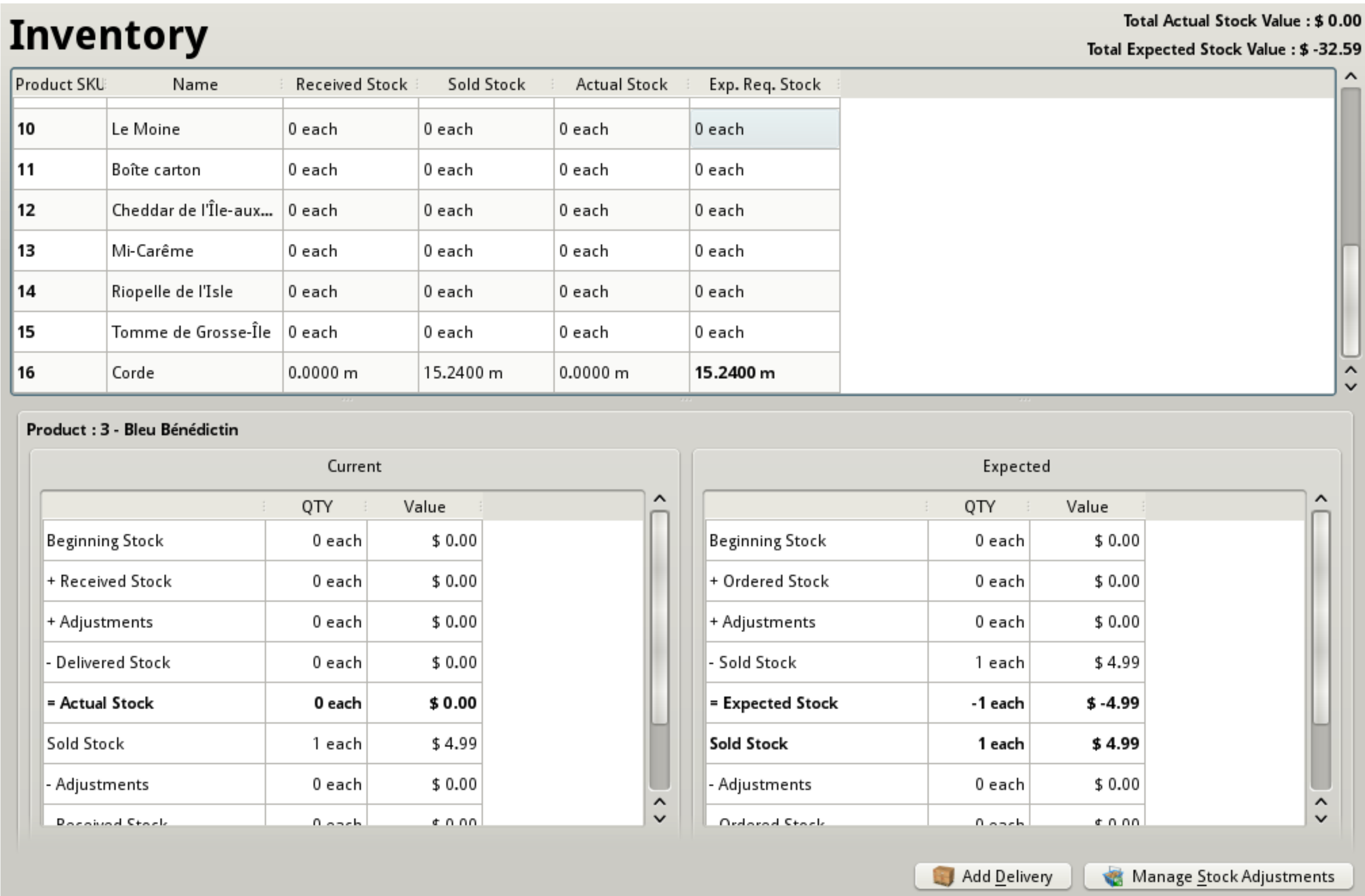


Illustration 46: The Inventory Module

All the products are displayed in the top table. In the two bottom tables, detailed stock informations are displayed for the selected product. To add a delivery with the expected required stock for a supplier, click on the *Add Delivery* button (or press Alt+D), and select the supplier. The New Delivery dialog will show up, with a preset delivery (see Table 4 for more informations).

Product	Supplier	Expected Required Stock	Quantity added to delivery
A	XYZ	10	10
B	XYZ	-2	0
C	XYZ	0	0

Table 4: Products added by New Delivery from Inventory

Item	Description
Beginning Stock	The stock at the beginning of the period
Received Stock	The stock received from suppliers (only Delivered deliveries are counted).
Adjustments	The total stock adjustments
Delivered Stock	The stock delivered to the customers (only Delivered orders are counted).
Actual Stock	Beginning Stock + Received Stock + Adjustments - Delivered Stock
Sold Stock	The stock sold to the customers
Actual Required Stock	Sold Stock – Adjustments - Received Stock

Table 5: Current Stock Items

Item	Description
Beginning Stock	The stock at the beginning of the period
Ordered Stock	The stock ordered to the suppliers
Adjustments	The total stock adjustments
Sold Stock	The stock sold to the customers
Expected Stock	Beginning Stock + Ordered Stock + Adjustments - Sold Stock
Expected Required Stock	Sold Stock – Adjustments - Ordered Stock

Table 6: Expected Stock Items

3.3 Reports and Charts

Reports and charts can be generated with the campaign data. Many reports and charts are included in the default installation package of CAMSEG SCM, but it's possible to create custom ones (see Annexe 1 for more details on how to do this).

3.3.1 Reports

Open the Reports module

To open the Reports module, click on the Reports tab in the main tab bar or press Ctrl+Shift+R. To open a report, double-click on it in the list located at the left of the screen. To close a report, click on the red X button on the report's tab.

Batch Report Generator

If a report is of type *Multiple* (different reports can be generated from the same report, such as the *Customer Invoice*), you can use the Batch Report Generator to generate multiple reports at once. To do so, select a report and click on the Batch Report Generator button. The following dialog will show up :

Illustration 47: The Batch Report Generator

Select the destination format (Disk, Printer or Screen) and the reports to generate, and click on OK. The reports will then be generated.

Print a report

To print a report, click on the Print button located under the report (or press Alt+P).

Save a report

To save a report, click on the Save button located under the report (or press Alt+S). There are four formats to which the report can be exported :

- PDF : Recommended format
- OpenDocument Text : Many items of the report are lost in the conversion
- HTML : Do not save the report in HTML if it contains images : they won't be accessible after you quit CAMSEG SCM.
- Post Script

3.3.2 Charts

Open the Charts module

To open the Charts module, click on the Charts tab in the main tab bar or press Ctrl+Shift+H. To open a chart, double-click on it in the list located at the left of the screen. To close a chart, click on the red X button on the chart's tab.

Print a chart

To print a chart, click on the Print button located under the chart (or press Alt+P).

Save a chart

To save a chart, click on the Save button located under the chart (or press Alt+S). There are three formats to which the chart can be exported :

- PNG : Creates an image
- PDF : Creates a PDF document (in Landscape orientation)
- SVG : Creates an SVG vectorial image

Chapter 4 – Other features

4.1 Import Campaign

It's possible to import a campaign into the current campaign. All the objects of the selected campaign will be added to the current campaign. It's possible to select which objects to import. For example, if you want to import only the Customers of another campaign, you can do it.

To import a campaign, open the Campaign > Import Campaign menu. Then, select the campaign you wish to import and click on OK. The Import Campaign dialog will show up :

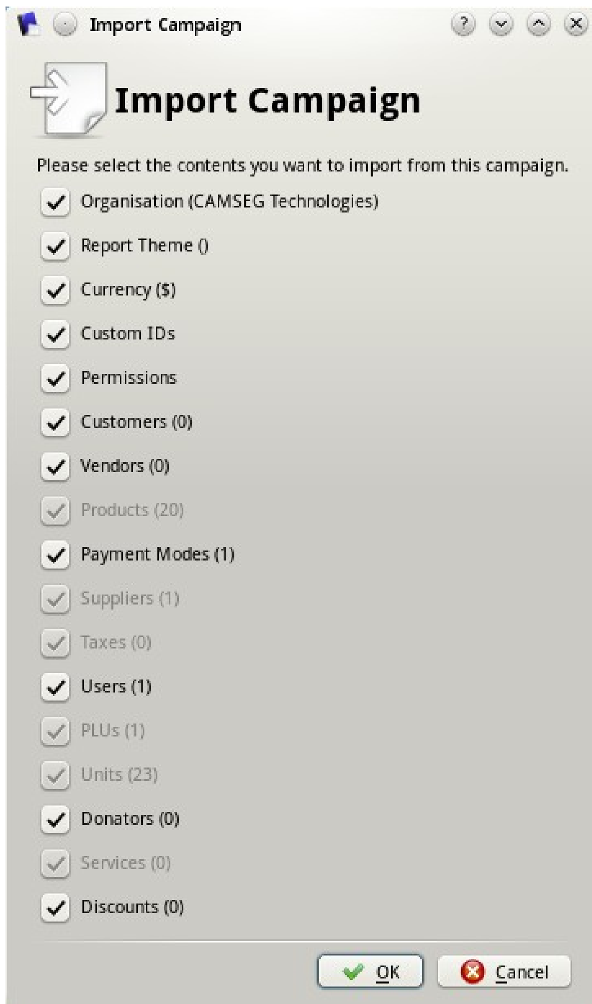


Illustration 48: The Import Campaign dialog

Some items are disabled because they are required by others. For example, you cannot import the Discounts without importing the PLUs. The number of object for each type is displayed in the parenthesis after the object name.

To import the campaign, click on OK. Note that it may take a while if there is a lot of objects to import.

4.2 Object import

It's possible to import customers, vendors and donators from a CSV file. CSV files can be generated from spreadsheets by software such as Excel or OpenOffice.org Calc. Note that the accepted value separators for CSV files are the comma (,) and the semicolon (;).

To import the objects, open the Import Objects dialog (menu Campaign > Import Objects). The following dialog will show up :

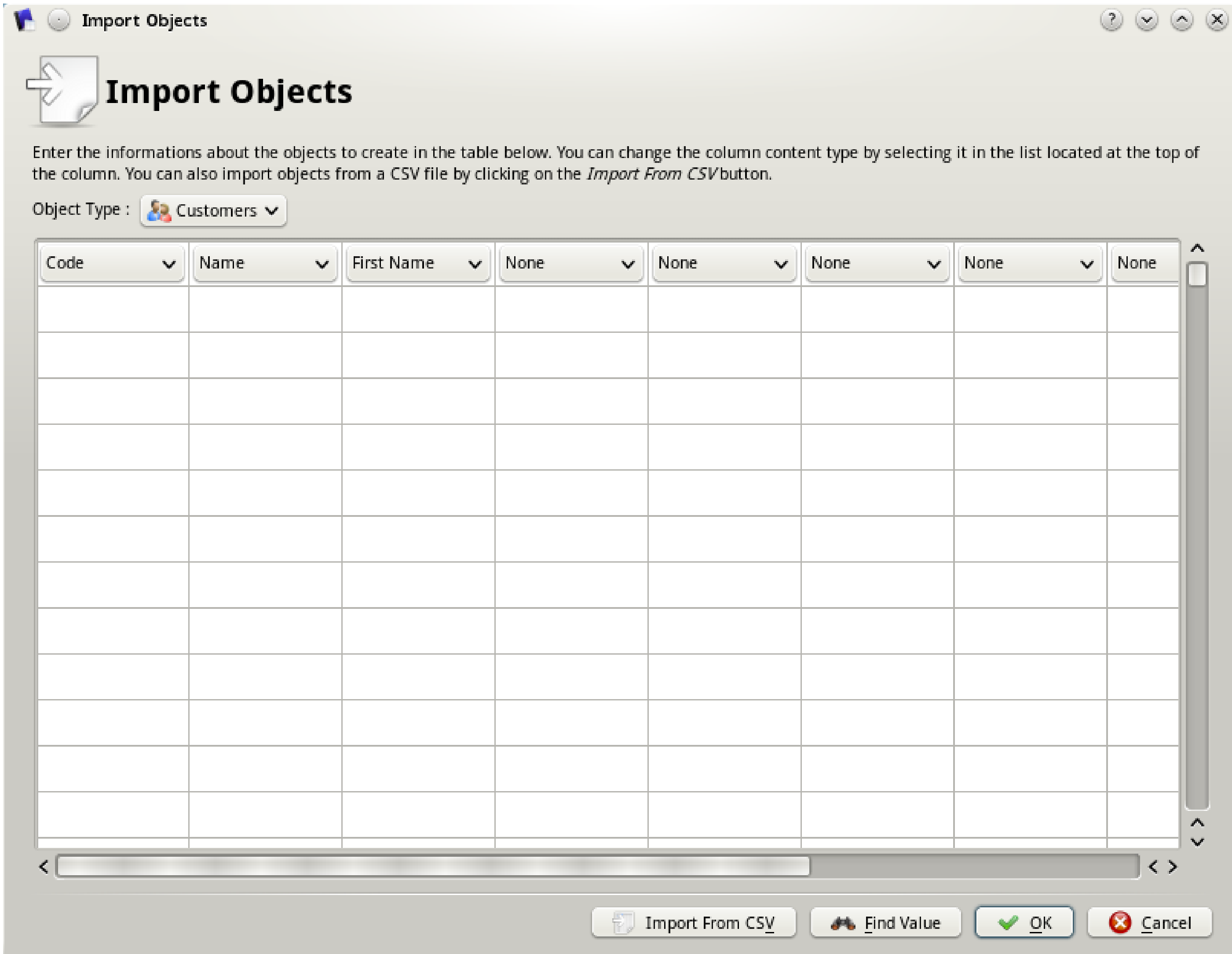


Illustration 49: The Import Objects dialog

Select the type of objects to import in the *Object Type* field and click on the *Import From CSV* button (or press Alt+V). Then, select the CSV file to import and click on OK. The file will be imported in the table.

You can make manual modifications by double-clicking on a cell. If you need to search or replace a value in the table, click on the *Find Value* button (or press Ctrl+F). This will pop up the Find Value dialog.

You need to choose the column type of each column. To do so, click on the drop-down list located at the top of the table and select the correct type. The *None* columns will not be processed.

To complete the operation, click on OK. The objects will then be imported. Note that it may take a while if there is a lot of objects to import.

4.3 Create Campaign With Current

To create a new campaign based on the current campaign which does not contain any operations (orders, deliveries, etc.), you can use the *Create Campaign With Current* function. To do so, open the Campaign > Create Campaign With Current menu. The following dialog will show up :

Illustration 50: Create Campaign With Current Dialog

New Campaign Name : The name of the new campaign

Save Path : The location where the new campaign will be saved.

Click on OK to create the new campaign.

4.4 Transactions Export

To export the campaign transactions (payments, donations, expenses and cash adjustments) to accounting software, you need to use the *Transactions Export* function. The transactions can be exported to the QIF or CSV file formats. To do so, open the Campaign > Export Transactions menu. The following dialog will show up :

Illustration 51: The Export Transactions Dialog

Account Name : The account name to which the transactions are exported

Date Range : The date range of the transactions. If you specify a date range, only the transactions that are within the range will be exported.

Save location : The location where the file will be saved

4.5 Time Periods

The Time Periods are a snapshot of the campaign for an older time period. For example, if you want to have separate period for each month, you create a new time period every month.

All the periods are separated from each other. It's like having multiple campaigns in one. For example, after closing a period, it's possible to delete a customer that had orders in the previous period. The customer will only be deleted in the *current* period. It won't be deleted in previous periods.

There are two types of periods :

- The current period : This is the period you manage your orders, customers, etc.
- Old periods : These periods are closed, they cannot change anymore. They can be accessed with the *Browse Old Periods* dialog. When the current period is closed, it becomes an old period and a new period is created which becomes the current period.

4.5.1 Close the current period

To close the current period, open the Campaign > Close Current Period menu. The following dialog will show up :

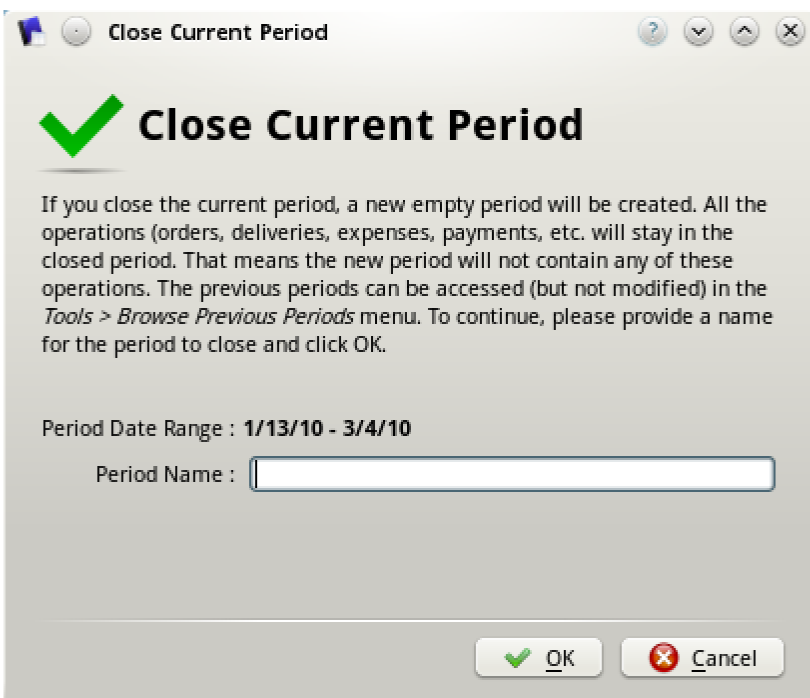


Illustration 52: The Close Current Period Dialog

Enter the period name and click on OK. If you make new periods every month, the period name could be 'March 2010' for March 2010, etc.

Right after clicking on OK, a dialog named *Enter Current Inventory* will show up. If you need to change the current inventory for the new period, enter it there. It won't be possible to change it anymore after, unless you close the period a second time. Click on OK to continue. The current period will now be closed and a new period will be created.

4.5.2 Browse old periods

To browse the previous periods and generate reports and charts, open the Campaign > Browse Old Periods menu (or press Ctrl+B). The following dialog will show up :

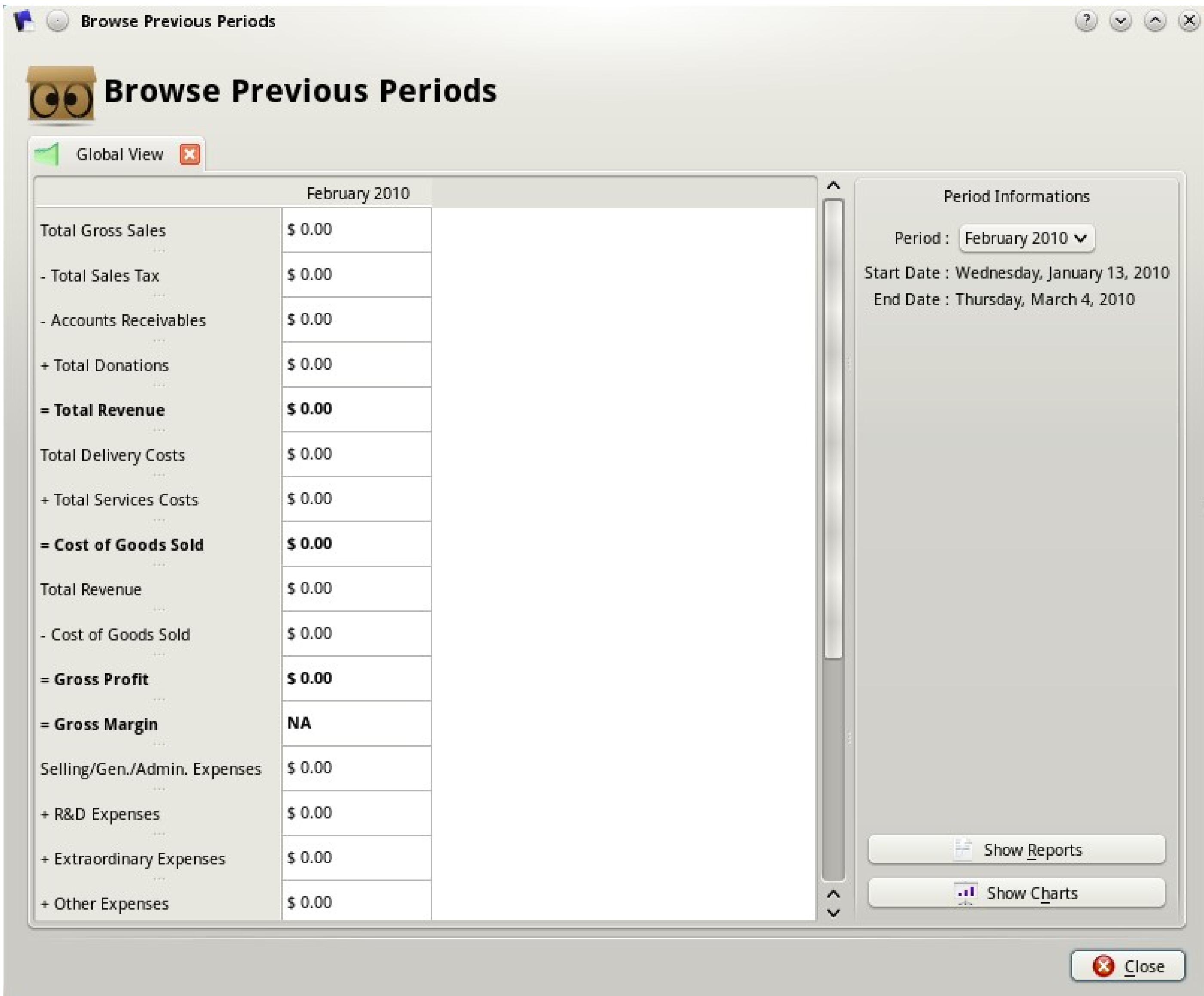


Illustration 53: The Browse Previous Periods Dialog

The central table contains a financial summary for all the closed periods (see section 3.1 for more details). In the right section of the screen, information is displayed for the period selected in the *Period* drop-down list. To generate reports or charts with the selected period, click respectively on the *Show Reports* or *Show Charts* buttons (or press Alt+R or Alt+H). A new tab will be created with the Report or Chart module for the period.

4.6 Batch Processing

The Batch Processing tool helps making large-scale changes. For example, if you want to change the price of 100 products, you can do it with just a few clicks instead of making the 100 changes. To open it, click on the Tools > Batch Processing menu (or press Ctrl+R). Then, choose the object type you want to process and click on OK. The following dialog will show up :

First, select the objects to process by adding them to the Processed table. The single arrow buttons move the selected items to the other table while the double arrows button move all the items of a table to the other.

Then, select the processing type : Modify or Delete. *Modify* will modify all selected objects while *Delete* will delete all selected objects. If you select *Modify*, check the boxes for the properties you want to modify and enter the new value.

To complete the operation, click on the OK button.

4.6 Execute CRL Queries

4.7 Point Of Sale