Getting started with Lynx

Revision 3.4

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1 Welcome

Welcome to the Lynx on-line business management system.

This guide is designed to help you get going with Lynx with the minimum of fuss. It will help you find your way around the main features of the system, and tell you where to look for more information about specific features which are covered in more detail in other Lynx guides.

I recommend you read the whole guide through to get an overview what the Lynx system can do for you, then work your way through each section one at a time, then do the same for each of the accompanying guides for the Counter, Stock and Retail modules as applicable to your set-up. It's best to do this over a couple of days for each guide, in short sessions, so that you have time to absorb what you have picked up and make some use of it before going on to the next topic.

The guides are structured so that you will get some benefit out of each element of the system you have mastered, and be able to build on this as you learn new features. This guide focuses on the set-up of your system and the management of your Lead and Customer databases.

The other guide documents for the Lynx system are:-

The Lynx Retail Project Management Guide – which covers the management of retail supply and fit projects, from issuing quotes, costing jobs, issuing contracts, purchasing materials and labour, managing fitting schedules and snagging and tracking purchases.

The Lynx Counter Transactions Guide – which covers over the counter sales of stocked and bought to order products

The Lynx Stock System Guide – which deals with stocked items, purchasing and stock management

The Lynx Email Guide – which deals with stocked items, purchasing and stock management

The Lynx Mailmerge Process – which describes in detail how to create mailings for leads and customers using email and the post.

Since Lynx exists in two versions, Fastrak and Pro, item which are only available in the Pro version are marked 'Pro' in the left margin.

Help System Note that the guides are designed to provide a framework of understanding, rather than field-level information about operating the Lynx programs.

This is available within the context-sensitive help system that is built in to Lynx. Click on the 'Help' icon at the top right of every screen to see the available help.

I hope you enjoy using the software. If you don't, please let me know what you would like to see improved, and your comments will be factored into future releases.

All the best

Ian Finch

ian@ifcon.co.uk

2 The Basic Setup

2.1 Modules and Licensing

Your Lynx system will be configured for you with the program modules you have selected and a maximum number of users. The modules selected will determine which programs are available to you, and certain sub-functions of programs, for example stock level checking in Counter Sales, will similarly become available as the associated modules are switched on. The main modules are

Counter – Trade counter sales functions – invoices, credits, cash and counter quotes

Retail – Retail sales functions, including projects and quotations

Stock – Stock control functions

Purchase – Purchase ordering functions

Email – Inbound and outbound Email handling

Some program functions, such as Lead and Customer management, are available regardless of which modules are configured. SMS messaging requires a paid account with a third-party service, theSMSWorks. Please see the Lynx SMS Guide for mode detail.

This information will all be set up for you before you first log in to Lynx. Please just bear in mind that the descriptions of some functions may not apply to your set-up where it is indicated that they are module-specific.

2.2 Web Browser

The use of Google Chrome is recommended as it is the one new Lynx releases are tested on. Firefox is also supported.

Safari on a Mac should also work, but since Apple have withdrawn the PC version it is now unsupported as any issues arising with Lynx cannot be debugged, and compatibility issues may arise in the future.

The use of Microsoft internet Explorer and Edge with Lynx is not supported as both suffer from a number of screen display and Javascript compatibility issues that make it uneconomic to support. Whichever browser you settle on, it's also best to be on the latest release.

Also, remember that browsers all let you have multiple tabs open, which means you can multi-task in Lynx as much as you like. If the phone rings while you are in the middle of something, just open a new browser tab (ctrl-T). One useful tip is that if you set your home page to be the Lynx home page, you can simply click the Home button in the new tab to get you to the Lynx menu. Alternatively, you can set up a shortcut (favourite) for this purpose.

2.3 User Accounts

Every user of Lynx has to log in to the system to use it. When your Lynx system is first set up, you will be given a URL (web site address) to access the software. The URL will be something like http://www.lynxhome.co.uk/mylynx. You can type this into your browser bar to access Lynx, or better still set up a shortcut in your browser so that it's just one click away. The way to do this varies from browser to browser, but if you use the Firefox browser (which is one of the ones I'd recommend, you just need to type Ctrl-D once the Lynx home page is open.

At the Lynx home page, you will be asked for a user ID and password. When your system is first set up, the only user account that will exist is 'admin' with a password of 'lynx' (you should change this straight away to something only you will know). You can use this login to amend the system configuration information and standard tables like VAT rates, and of course to set up more users.

Each user has a number of 'roles' associated with it, which can be selected for each user individually. These roles (e.g. 'admin', 'sales', 'stock') will allow the user access to relevant programs. This enables you to set up Lynx in such a way that staff members only need have access to the functions they will use, and prevents the use of programs that are not appropriate for them.

2.3.1 Creating a New User

To create a new user record you will need a login that is in the 'admin' role (the administrator account, for example).

From the menu, select Admin -> Users -> Add user.

The Add User program will let you enter a user ID for the staff member (e.g. 'fred'), and their first and last name and E-mail address. If you are using the Stock module, you will also want to set them up with a default working location.

Users can also be set up without login access – this enables some members of staff to be set up as ‘resources’ within the system, without having access to the Lynx programs. These users can be sent SMS and Email messages, can have a calendar (managed by someone else) and appear in certain drop-down lists, such as the list of Account Managers.

When you submit the form, a new account will be set up, and an e-mail sent to the address you entered containing the URL of the Lynx system, the user ID you entered and a system-generated password. The recipient of the E-mail can then simply click on the link to get to the Lynx home page and log on, As the system generated passwords can be hard to remember, it is highly recommended that the first thing the new user does is to change it to something memorable. The 'Password' link at the top right of every screen will allow then to do this. Note that administrators can use this same link to change any user's password.

2.3.2 Editing User Records

Once a user has been set up on the system, their information can be altered using the **Admin -> Users -> Edit User program**. This program can also be used to delete users from the system, though it is generally best simply to remove their login access and/or remove the roles associated with their login.

2.4 System Configuration

Many of the features of the Lynx system are controlled by the system configuration information. This includes the features that are available for you to use, lists of things like customer type codes and access information to third party services such as Email and SMS messaging.

Much of the configuration information can be amended by users (provided they have system administrator privileges) using the **Admin -> System Config** program.

When the Lynx system is first set up, some of the things you may well want to alter are the system logos and name, transaction prefix codes, customer, lead and contract types and the account information for SMS messaging. IFCon can do this setup for you if you would prefer. It is a good idea when you start using Lynx to go through each of the tabs on the configuration screen to understand what each of the fields does – it may well make you aware of features of the program that you did not know are there.

2.4.1 Logos

Lynx has a 'Logo Library' that lets you have multiple logos and other similar images that are used to 'brand' your Lynx installation.

Each screen has the main logo displayed at the top left. Additionally, there is a separate logo file that is used for printing Invoices and other system-generated documents. You can also insert images into letters and other PDF documents that Lynx creates for you by amending the templates for these documents to insert a link - but more of that later. All of these images are stored in a 'Logo Gallery' that you can create and update yourself. All you need are suitable images on your computer hard drive that can be uploaded to Lynx.

I recommend that you start by uploading your company logo to the library, and changing the system configuration to point to it. To do this, go to **Admin -> Mailmerge -> Logo Gallery.** Click on the 'Add Logo' button, and select your logo file from your hard drive. A good size logo is about 100 pixels high by 150 wide.

Once the logo is uploaded, you can change the system configuration to use it (on the 'General' tab). So if, for example, the file you uploaded is called 'mylogo.gif', the system configuration value of the LOGO field should read **logos/mylogo.gif**.

Similarly, it is a good idea to set up the PRINTLOGO image that will be used in your invoices. It's best to use an image with better resolution for this (say 200px high by 400px wide) so that it doesn't look jagged when you print documents out.

2.4.2 Company Information

The basic company information is also on the 'General' tab. Note that it is important to set up the 'LETTERHEAD' and 'LETTERFOOT' fields with your correct company information as this will appear on your Invoices and Credit Notes. Certain legal requirements apply to this information, including the need to quote your Company Registration number at Companies House if you are an incorporated business, and your VAT registration number if you charge VAT.

2.4.3 Prefixes

Several of the system-generated numbers in Lynx can have an associated prefix. You may choose, for example, to use the prefix 'ORD' before all your order numbers or 'PRJ' for all your Project references. These are all available to be changed on the 'Prefix' tab.Multi-Location Operation

If you are operating Lynx in multiple location mode, several of the options available in the System Config can be overridden at the Location level, including contact details and numbering prefixes.

These Location-level overrides can be set in the **Admin->Tables->Edit Location** program.

In multi-Location mode, the Location you are working with is always displayed in the Menu Links area at the top right of the screen. IF you click on the displayed location, you will see a drop-down list of locations – click on a different one to change your working Location.

Note that some screens do not allow you to change working location. It is easiest to go to the home page, change location, and then start the program again from the menu in the programs to which this applies.

Users can be restricted in the Locations which they can select as their working location. This can be amended in the **Admin->Users->Edit User** program.

In multiple location mode, several Lynx programs have an additional Location selection box, as do many of the reporting programs. This is applicable particularly when working with Stock.

To make the system a little clearer to navigate, you can also amend the colour of the menu bar for each separate Location. This provides a visual cue to the Location you are working with. The appearance of the menu bar is controlled by using the **Admin->Tables->Style Manager** program to create a custom 'style'.

The custom style is named as 'menu' plus the Location name in lower case – for example 'menuleeds'. In this case, when logged in to the Leeds location, the menu background and font colours would be overridden by the custom style.

3 System Data Tables

3.1 The Parts Grid and Associated Tables

The Parts Table sits at the heart of the Trade Counter functions provided by Lynx, particularly invoicing and stock control, and is also very useful in the Retail supply and fit programs where it allows sales to be categorized and facilitates purchase ordering.

The table itself comprises a long list of codes, each with a description and a number of attributes. For Trade Counter sales, these codes represent types of physical items that are uniquely identified by a single code. For example, the code 'AA123' might represent a tube of silicon. For each part code, the attribute codes (part type, usage type, product group and so-on) define what sort of item the part code represents, how it should be sold and ordered and what prices and discounts apply.

Adding and updating parts is done via the **Admin -> Parts -> Parts Grid** program. This program displays all the parts on the system in the form of a grid, and allows you to change the values much as you would enter details in a spreadsheet, by double-clicking on the value you want to change. You can then either enter a new value or use the pull-down lists provided for some fields to select from the available values (for example the Product Group field, which will only allow you to select from the list of available group codes you have set up previously).

As many of the values you will need in setting up new parts must already exist in the system, you should start setting up your Parts table by creating the look-up values on the Product Category, Product Sub-Category and Product Group tables. These tables are made up of a series of codes and associated descriptions. The Product Category and Sub-Category tables are used to organize similar parts together, which makes it much easier to locate a code for a particular part when it is sold. The Product Group code is used to classify parts for discount purposes. Used in conjunction with a customer's Discount Group code, the Product Group will determine the percentage discount applicable for the part. These codes are also managed using a series of grid data-entry programs which can be found on the **Admin ->Parts** menu.

You will also need to set up your VAT Codes table and, if using Purchase Ordering, the Supplier Table before creating parts. See the VAT Codes section below, and the Suppliers section of the Purchase Ordering system description.

3.1.1 Product Category and Sub-Category

The Product Category and Sub Category codes are a convenient way to organize your parts table so that you can find particular items at point of sale, or for reporting purposes.

A typical set of Product Categories and Sub categories might look something like the tables below. Note that categories and sub-categories are not hierarchical - you can use the same sub-category (e.g. 'OTHER') for parts that exist in different part categories.

Product Categories

Code	Description
TRIM	Trims and Architraves
FIXING	Screws and Fixings
GLUE	Glues and mastics
TOOLS	Tools

Product Sub-Categories

Code	Description
QUAD	Quadrant sections
CILL	Cill sections
ARCH	Architraves
TOOLS	Tools
SCREWS	Screws
NAILS	Nails
SILICON	Silicon Sealants
SUPERGLUE	Superglues and accelerators
HANDTOOL	Hand Tools
BITS	Drill Bits
DISCS	Sanding Discs
SAFETY	Safety Clothing and Equipment

3.1.2 Product Group

Product Group codes are used to determine discounts, so parts will be organized broadly into areas where margins are similar, or where particular customer groups will need a keener price. So, for example, you might want to categorize products where your competitors price keenly together, so you can manage the levels of discount you offer on these products separately. Remember that the combination of the Product Group and the customer's Discount Band determines the level of discount, so you can offer, say, regular trade customers a different level of discount to those given to consumers.

Product Group

Code	Description
BUILD	Building Materials
TOOLS	Tools
WINDOW	Windows and Doors
LOSSLEAD	Loss Leader Items

3.1.3 Parts for Retail Supply and Fit

In a Retail context, the setup of the parts grid is much simpler as you will not have hundreds or thousands of items that are sold individually.

Instead, you need to think about how you sell and purchase items, and set up part codes that represent the elements of your normal pricing and cost make-up. When you create a supply and fit Project, you will be able to create a cost make-up for the job, which can be used as the basis of your selling price and margin calculations. This cost make up can then be used through the Purchasing system to remind you to order items needed for a job, and to issue works orders for sub-contract labour. Similarly, a quote can be crated for the Project which breaks the selling price down into the elements that you use to work out your charge to your customer (these may overlap with the codes used in the cost make-up, or be completely separate).

Using the part code table for the build-up of cost calculations and quotations acts as a shorthand - on other words you don't have to enter length descriptions as you might have to do in a spreadsheet system or similar. It also means that items you need to buy in specially can be added to your 'to buy' list so that they are not forgotten.

A set of codes similar to that below would be a good place to start:

Part Code	Description	Part type	Stock Type	Meaning
PVCWIN	PVC Windows and Doors	BOUGHT-IN	B	Used in cost-build up and quotations for PVC items.
ALIWIN	Aluminium Windows and Doors	BOUGHT-IN	B	Used in cost-build up and quotations for ALI items
CD	Composite Doors	BOUGHT-IN	B	Used in cost-build up and quotations for composite doors
GLASS	Sealed units and panels	BOUGHT-IN	B	Used in cost build up for glass and panels (where the cost is not generally included in the quotation selling price build-up)
EXTRAS	Miscellaneous extra items	BOUGHT-IN	B	Sundry extra items such as specialist door furniture or other items that need to be costed and which you may also need to remember to order in specially
FIT	Fitting Labour	FITTING	C	Used for the cost build up to record anticipated labour costs
CONS	Consumable items	MATERIALS	S or M	Used to record the expected costs of consumable items (for which you may or may not record stock holdings)
MATS	Sundry materials	MATERIALS	M	Used in the cost build-up for items such as sand and cement,

				which are bought to order on an ad-hoc basis rather than being purchased specifically to order.
HIRE	Hired Equipment	BOUGHT-IN	C	Used in the cost build up for the hire of equipment such as scaffolding
TRAVEL	Travel Costs	SPECIALS	M	Sundry costs associated with travel and parking
SURVEY	External Surveyor Costs	FITTING	C	Used in the cost make up for external survey charges
COMMISSION	Sales Commission	SPECIALS	C	If you wish to cost in sales commission in the calculation of margin, include a code like this so that the commission costs can be built in to the make-up

3.1.4 Loading Data from Spreadsheets

The Lynx system allows part data to be loaded from spreadsheets to speed up the processes of initial loading and subsequent price maintenance.

We will discuss initial part loading with you, and help you through the steps to create a part spreadsheet. The 'Part Loader' program should not generally be used except under specific advice from us.

The **Admin - Tables ->Price Upload** program on the other hand is a very useful way to keep cost prices and selling prices up to date. Simply create an Excel spreadsheet containing the Lynx part codes, Cost Price and Selling Price values in separate columns in a single worksheet. If you are able to obtain a spreadsheet from your parts supplier, this can be used directly. Simply upload the file, indicating the columns which contain the relevant fields (both cost and sell price fields are optional) and if required indicate a minimum selling price multiple. If the latter is provided, the list sell price will be increased if required to ensure it is at least 'n' times the cost price.

The program will check the part codes are valid and display the proposed changes to the Parts table. You can then either commit these changes, or cancel the update.

3.1.5 Bar Coding

The Lynx system allows parts to be bar-coded, to speed up Trade Counter operations. If you wish to use bar coding, each part will need a unique bar code which is entered on the Parts Grid.

The physical bar code to be used on the item labels or look-up chart used at point of sale must be in Code128 format, with an '*' (Asterisk) character preceding the alphanumeric code used on the Parts Grid. The asterisk is needed to allow Lynx to distinguish between manually typed codes and scanned bar codes when entering a trade counter sale. Bar coded items are added automatically with a quantity of one, and a new line started in the counter sale program, allowing several items to be scanned in succession without using the keyboard to add a new line to the order.

The **Counter -> Barcodes** menu provides three programs that will help with bar coding the physical stock items:

Individual Bar Codes - Allows selection of a part and entry of quantity of labels to print, designed for use with dedicated label printer attached to your own server, though it will generate a PDF with a single bar code which can be downloaded and printed if required.

Avery J8654 Barcode Sheets - Allows one or more sheets of Avery J8654 labels (40 per sheet) to be printer for a single part.

Product Barcode Sheets - Prints a barcode out for every bar-coded part, with the part description underneath, organized into pages of 3 codes wide by 10 down, sequenced by product group and with a new page at the start of each group. These sheets can be selectively printed and laminated for use on the Trade counter.

Alternatively, you may wish to use the label generation program normally provided with dedicated label printers. Simply remember to put the '*' before the part code.

3.2 VAT Codes

Lynx allows multiple VAT codes and rates, which can be selected on a line-by-line basis when creating counter sale or invoice etc. In general, you will need to set up just two codes:

S - For standard VAT

Z - For zero-rated items

The VAT table is maintained using the **Admin->Tables->VAT** codes grid program

3.3 Workflow and Task Sets

Lynx has a powerful mechanism for the creation of workflows - lists of things that need to be done when, for example, a new lead is taken or a customer created. When the workflow creation is triggered, a set of to-do items and appointments are automatically set up, with each step optionally depending on a predecessor, so that actions only appear as due when things that need to happen first are completed. Each is also associated with one or more 'roles' (sales, project management etc.) so that tasks only appear for appropriate individuals to carry them out.

So, for example, the workflow for a lead might be:-

1. Call prospect to qualify and understand their interest (Role: Sales)
2. Set up an initial appointment or showroom visit (Role: Sales)
3. Issue a quote (Role: Sales)
4. Follow up the quote (Role: Sales)
5. Close the lead or mark as lost (Role: Admin)

So the workflow in this case would have five steps, each due to take place as its predecessor is complete.

Each step can have a 'timer' set on it so that if it is not complete within a certain period of time, it shows as overdue. As steps are due to start, they appear on the to-do list for staff in the associated role, and can be marked as complete or assigned to an individual to be carried out. As a workflow to-do item is marked complete, an optional comment can be entered (which will appear in the history associated with the lead etc.) and a flag to indicate that no further action is required, for example if a prospect indicates that they do not wish to proceed.

For flexibility, the workflow used in each case can be varied with the type of customer, lead, project etc. being created. So, for example, the steps you may wish to apply to a conservatory lead may include an initial site visit prior to quotation.

To set up a workflow, you must first create a 'Task Set' using the **Admin->Tables->Task Sets** program. Each task set has a name and a set of to-do items and appointments associated with it, each assigned to one or more roles. Additionally, the item may have a 'due within' time period (in working days) and a predecessor ('Follows item') which must be completed before the item is available to be carried out. An optional 'Category' field allows to-do items in particular to be filtered on the to-do lists, so that, for example, all survey-related items can quickly be identified. The program allows Taksets to be created ('New Taskset'), or selected from the list of existing Tasksets for amendment. Individual items can similarly be added ('Add item') or deleted (using the 'red cross' icon).

Once task sets are created, they are associated with the events that fire them off using the **Admin->Tables->Workflow Matrix** program. this allows you to select the type of item being created (Lead, Customer, Project or Contract) and lists the available type codes (e.g. "Domestic", "Commercial", "Trade"), against which the Taskset to be used is selected from the list of Tasksets in the system. An optional default Taskset can also be indicated, and is used where a particular Taskset has not been created for the type of Lead, Customer etc.

Setting up Tasksets and the Workflow Matrix does not have to be done from day one, but it is worth considering setting up a Taskset for leads in particular, as this is one area where having a disciplined approach to managing the tasks can have substantial benefits. It should be remembered that to-do lists are of no use unless there is a willingness to use them on the part of staff and management alike. Success therefore depends on good communication before, during and after their introduction, combined with a management will to monitor activity and ensure the Lynx system is updated promptly.

3.4 Retail Supply and Fit Setup

Lynx Retail includes a number of program modules that allow the management of supply and fit contracts. These require some additional set-up for the system to work at its best.

Billing Models are used by Lynx to set up default charges for contracts, based upon the progress of the job. Typically, jobs will be broken into one or more phases, and there will be a deposit, charges that are made either at the start or end of a phase of building or fitting, and perhaps a final retention amount. Billing models reflect this structure, and by entering the percentage of the contract value chargeable at each stage, the amounts to be billed can be calculated. This information is then used on conjunction with the actual fitting dates to prompt invoicing.

Lynx also has a Quotation Library, which is a sort of electronic filing-cabinet for 'boilerplate' brochures and other standard documents which can be included with quotations when they are assembled. This list of documents can also include your terms and conditions, testimonials and the like, from which the person preparing a quotation can select.

Some document 'Letter' templates will also need to be set up for the Retail Quotation system to be operational - see the '**Lynx Mailmerge Process'** guide for more details.

3.4.1 Billing Models

You will need to set up a Billing Model for each type of contract you operate. Typically, this will mean a simple model for a supply and fit of windows and doors, and a more complex one for conservatories, which may be split into base work, construction and final fit phases or into any other sequence of stages you wish, in line with your normal working practice.

The list of possible Contract Types is something you can change in the **Admin ->System Config** screen.

Maintenance of Billing Models is carried out using the **Admin->Tables->Billing Models** program. Select the Contract Type from the drop down list, enter the deposit percentage you normally charge, and then add one or more stages to the list in the grid, indicating for each the percentage of the contract value applicable. The retention amount will be automatically calculated. Note that you are not stock with these percentages, which can be changed on a project-by-project basis.

3.4.2 Quotation Library

The quotation library should include electronic PDF documents for your standard terms of business, brochures, company history, method statements and any other documents you may wish to incorporate into a quotation.

Documents can be uploaded to the library using the **Admin->tables->Quotation Library** program. You simply select documents from your computer to upload using the 'Add Document button. They will then be included in the library and can be selected for inclusion in a quotation by simply ticking the box that will appear next to the document name. It is a good idea to give documents a meaningful description that you will recognize when you come to do this later - e.g. 'Standard Terms of Business', 'Composite Door Brochure', 'Stained Glass Brochure'.

3.5 Letters and Mailmerge

Lynx has a flexible system to allow individual letters to be created and sent by post or E-mail. It can also generate mass-mailings, which can be sent by either means, or a combination of the two.

All letters are based on templates created in HTML, the same 'language' used in web pages. This allows different fonts, bold type, coloured type and so-on to be used, or images to be included from the 'Logo Gallery'. You can also include different letter head styles, and signature blocks which may include a scanned signature for each individual. For more information on this topic, please refer to the **'Lynx Mailmerge Process'** guide before proceeding.

For retail installers, you will want to set up templates for your quotations. This follows broadly the same process as the creation of letter templates, except that some additional information is available to be included in the document body. The full list of codes to be used for these blocks of information ('Mail Merge Fields') is contained in the Help system.

3.6 Style Manager

The Style Manager is a powerful tool that can be used to customize the appearance of most of the displayed items in Lynx - for example the screen fonts and colours used, table backgrounds and so-on. If you would like to customize your system please ask for more information.

One area that is worth setting up straight away using the Style Manager are the colours of the different lead types displayed on the Lead Workflow screen which provides an overview of the sales leads coming into your organization. This allows you to see, for example, showroom leads as green, web site leads as blue and direct-generated leads as yellow.

The 'style names' uses for each type of lead are made up of the letters 'tc' (for T-Card) plus the source of the lead. So, for example, the style name for leads with a type of 'Showroom' would be 'tcshowroom'.

Creating and amending styles is done using the **Admin->Style Manager** program. For each style, you can select font sizes, colours and bold/italic text Colours are picked using the slider on the right of the screen to select hue, then picking the precise colour by dragging the small circle pointer over the square colour box to the left of the slider, before clicking 'Set 'background' or 'Set Foreground' appropriately. Alternatively you can enter the 6-character hexadecimal code of the required colour if you know it, or the RGB values.

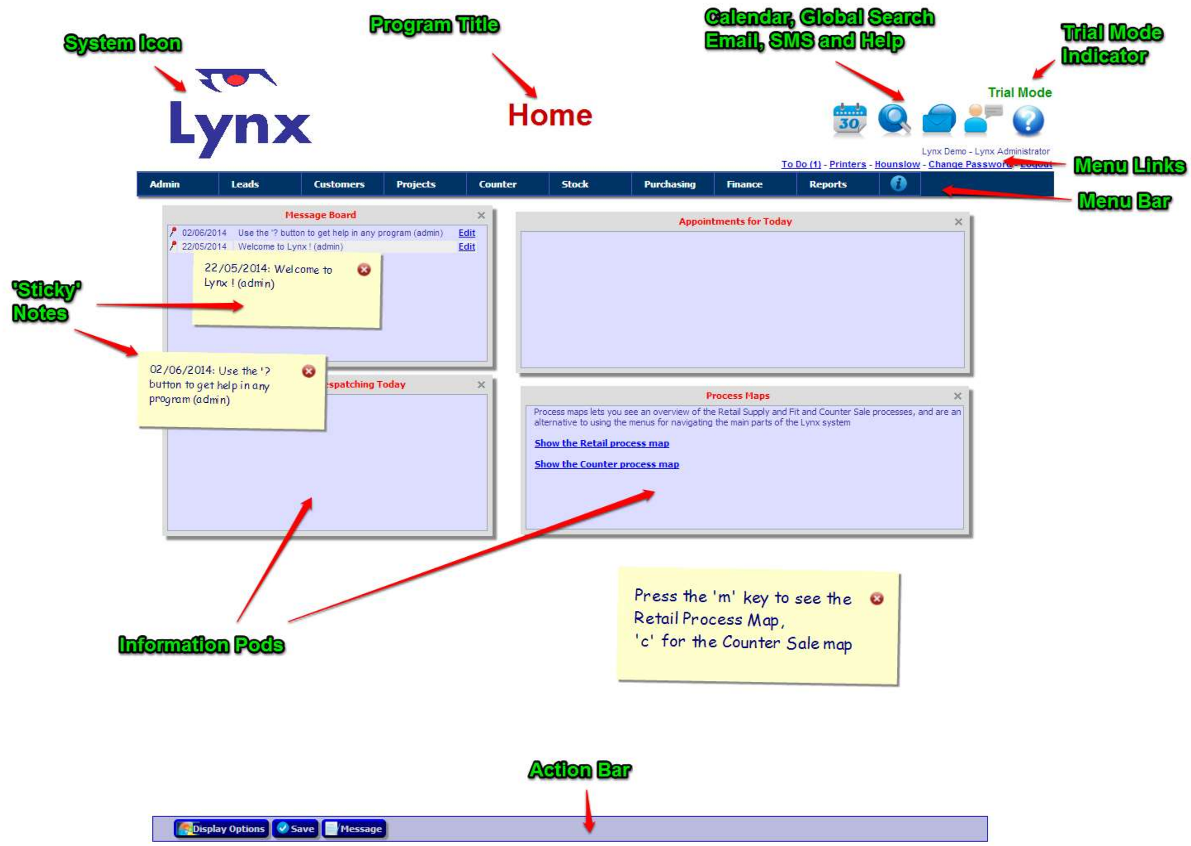
Existing custom styles are displayed visually so it is easy to be sure that the style has been set up correctly. Once you are happy with an individual style, click 'Save Style'.

When the style creation or amendment is complete, click 'Update CSS' to save your changes away to the custom style sheet file for your site.

4 The Home Page and Menus

4.1 Layout Features

Once you have logged in to Lynx, you will see a Home Page which contains a number of information 'Pods' and other common features.



Please refer to the notes on the following pages to understand the use of the various home page features, including how to customise the display to best suit your needs.

4.2 Common Features

System Icon – Click to get back to the home page at any time. Place your mouse over the logo to see which modules are active in your Lynx system.

Program Title – Displayed for every program

Calendar, Global Search (etc.) Buttons:

Go to the Lynx Calendar

Global search : Type in a string and search for matches across your Lynx database

Takes you to the Email manager program

Send an SMS message to one or more Lynx users

Shows you help for the program you are in

Trial Mode Indicator – This is shown if your Lynx system is in 'Trial 'mode. All features will still work normally EXCEPT that Emails and SMS messages will be sent to an IFCon account, rather than the Email addresses for your leads, customers and staff.

Menu Links – Access your To Do list (the number of personal to-do items due is shown), change your session Printers, Location or login Password, or log out of Lynx. Put your mouse over your log-in name to see the list of roles you have assigned and your browser type and version.

Menu Bar – Start any of the Lynx programs you have access to.

Action Bar - This comprises a set of 'Action Buttons' which cause things to happen within the context of the Lynx program you are in, such as editing a record, sending a letter or uploading a file.

Sticky Notes – Where the screen you are in has associated note items which are 'Sticky', they will be displayed in this format. This can be turned off in the **Admin->System Config** screen.

4.3 Information Pods

The actual Pods you see will depend on the access you have to the system, and how you have configured the home page screen previously, to suit your own needs. You can, for example, hide the 'Despatch' Pod if you are not involved in despatching goods from the trade counter, or if your company does not operate a supply-only business.

You can use your mouse to move the Pods around on the screen, grow or shrink them by grabbing the corners with your mouse and dragging, or click on the 'X' at the top right of each Pod to hide it.

Important - If you want changes to your Pod layout to be remembered, you must click the Save button once you are happy with the layout.

The list of Pods displayed can be amended by clicking the Display Options button on the Action Bar. If you have closed a Pod and want to re-open it, you will need to do this tick the checkbox beside the Pod name.

The purpose of each of the Pods is described below.

Message Board Pod

This Pod shows you a list of system-wide messages that have been posted by you and other users. To add a new message, click on the button on the Action Bar. Click on the ‘Edit’ link to change or delete a message.

To Do Pod

Shows you to-do items which are either assigned to you or are assigned to a role which you have on your User record. Click on the blue link to go to the enquiry program for any associated lead, customer, project etc.

Appointments Pod

Displays your personal appointments for the day

Despatch Pod

Shows Sales Order items due for despatch today

Project Billing Pod

Displays a list of items due to be billed for supply and fit Projects

Service Calls Pod

Lists all open service calls, with urgent calls at the top. Click on the link to the service call to see the full detail.

Process Map Pod

Click on the link to see the Retail (Supply and Fit) or Counter Sale (Supply only) process maps. You can also get to these by pressing the ‘m’ and ‘c’ keys respectively. The ‘h’ key will bring you back from the map to the normal home page.

Note that once this Pod is hidden, the yellow ‘sticky’ note reminder about the use of the m/c keys also disappears.

4.4 Display Options

In addition to switching Pods on and off, the Display Options button allows you to change some other features of the Lynx home page and other screens:

Fixed Action Bar

Normally, the Action Bar floats on each page, so if you have a lot of data to display, it will always be visible 'above the fold', and as you scroll down the page, it remains fixed, potentially obscuring information behind it.

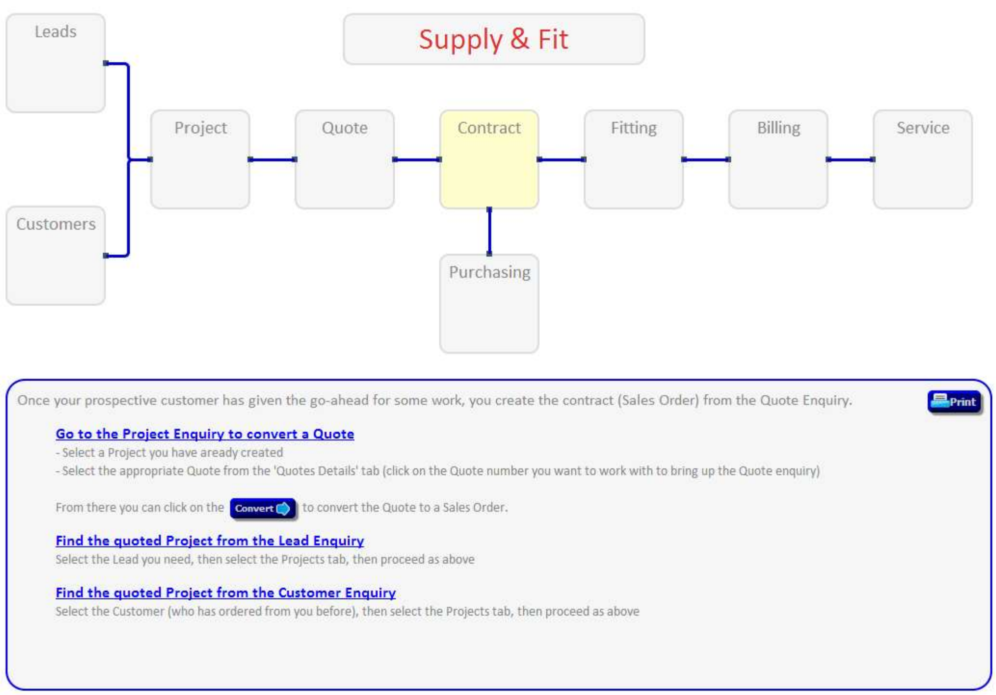
Some users prefer it if the Action Bar appears after all the page text. Ticking on the 'Fixed action bar' checkbox forces this behaviour.

Minimal Masthead

Once you are familiar with the function of the items at the top of the screen, you can gain a bit more space in your browser window by checking this box. It will replace the standard Lynx 'masthead' items at the top of the page with a smaller display, with the Calendar (etc.) buttons appearing at the top left instead of your company logo. Note that an additional 'Home' button is displayed to let you navigate back to the home page.

4.5 Process Maps

The Retail (supply and fit) and Counter Sale (supply only) process map screens provide an alternative to menu access to the main Lynx programs, and can be helpful if you are new to Lynx to finding your way around the system.



As you place you mouse over any of the steps in the map, the information area at the bottom will change to tell you a bit more about the process step, and offer some links to the key programs used. You can also click on the 'Print' button to get a printable PDF of the information shown.

4.6 The Information Menu

At the right of the Menu Bar on each page is the Information Menu. This drop-down menu is a quick way to access information about your version of Lynx, program documentation and get support.

The About Page

This page shows you a list of the changes made to Lynx, in most recent first sequence. If is very useful to review this every time your Lynx system is upgraded.

Bugs – Bugtracker Link

If you come across any problems with Lynx, you can report them using the Lynx 'Bugtracker'. This menu option takes you to another web site, where you can log the details of the problem you have encountered. If you do not already have a Bugtracker account, you can set one up from the Bugtracker login page.

Support – Join.Me Link

This menu option is a link to a 3rd part service called Join.Me, which allows you to download a small program on to your system and install it. Once this is done, you will be able to provide a 'session number' to IFCon to receive remote login support.

Docs

This menu option contains links to the main Lynx Guide documents, including this one. Click on the name of the guide to download it in PDF format.

Downloads

Currently, this allows you just to download the Lynx Mobile App for Android phones, from the Google Play store.

5 Managing Leads

A 'Lead' in Lynx is an organization or private individual(s) who are potential future customers. The Lynx lead database is a powerful tool for managing the list of leads, ensuring actions are completed in a timely manner, and managing communications with prospective future customers.

Once a lead is created, you can add to-do items, create appointments, attach electronic documents and notes, and create Email and SMS messages or letters to communicate with the lead, all of which can be automatically tracked for you.

Additionally, the lead creation process can trigger a 'Taskset' (see 'Workflow and Task Sets' above), which will ensure that the proper follow up actions for the type of lead created are added to the list to be carried out.

5.1 Create a Lead Record

From the menu, select **Leads -> New Lead Enter** the lead contact details. This is fairly self-explanatory, but please refer to the Help system for more information about individual fields.

To create the lead record, click the 'Submit' button. This will create the record and any required Taskset To-Do and Appointment items.

5.2 The Lead Enquiry Screen

The Lead Enquiry Screen shows you information about a Lead, and allows you to expand the Lead information by attaching electronic documents and notes. You can also set up to-do items for the lead, create appointments and communicate by Email or SMS. The various functions are described below under 'Action Buttons'.

NOTE: Searching for a Lead in the enquiry program uses an 'autocompleter' box, which searches for matches to whatever you type in. Thus Leads can be found by (partial) name, address, telephone number and so-on. This is a common feature to many Lynx programs, where you are search for Leads, Customers, Part items and so-on.

Note that if the autocompleter has a very long list to matches to display, it will not show them all to keep the performance of the system rapid. To override this behaviour, enter a '+' sign at the end of the search term typed.

Normally, Leads are only shown if they are currently active. You can, however, show all leads by checking the 'Show converted/dead leads?' checkbox when searching for a Lead. This will cause all Leads to be shown, even if they have been converted to a customer or marked as dead.

5.3 Edit a Lead Record

Editing a Lead record is very similar to the process of creating a new Lead. Any of the fields entered previously can be amended, but note that any quotes will not be automatically re-priced if you change the level of discount.

Clicking on the 'Delete' button will mark the Lead as Deleted. This is similar to marking it Lost EXCEPT that the record will not appear in the Lead Enquiry if the 'Show Converted…' checkbox is ticked. Deletion of Leads cannot be undone.

5.4 Convert a Lead to a Customer

A simple way to turn a Lead into a Customer is to use the 'Convert' action button as described above. The conversion process moves all To-Do items, Attachments and Notes from the Lead to the newly created Customer. Note that the Customer account number will very likely NOT be the same as the Lead number.

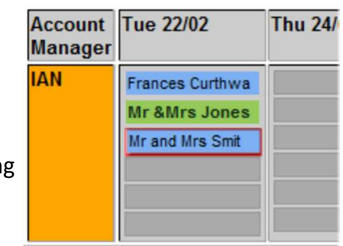
When you perform the conversion, you will be required to select the Customer Discount Band applicable as well as the account terms and VAT status. See 'Create a Customer Record' below for more information.

Additionally, any Quotations or Counter quotes for the Lead will be transferred over to the Customer record.

You can still enquire on the Lead details, by selecting the 'Show converted…' option on the Lead Enquiry, but the status will show as 'Converted' and none of the detail tabs or action buttons will be available. Simply click on the 'Customer Account' link to see the full detail.

5.5 The Lead Workflow and Lead Pipeline

The Lead Workflow program provides a quick way to keep tabs on the progress of Leads from the point of initial contact through to sale or closure. It works in conjunction with the Taskset system to give you a quick visual of what Leads are being worked on, and any overdue actions – for example follow-up calls due or appointments to be made,



The program presents open Leads in a format similar to a T-card system, with each account manager having their own section vertically, and the last 30 days leads shown horizontally across the screen.

Leads are colour coded (you can use your own colour-coding scheme by changing the T-card styles – see 'Style Manager' above), and if there are overdue actions, the Lead 'card' is framed in red.

For a quick summary of what is going on with a lead, hover your mouse over the card, and you will see the full name and address and the next action due on the lead if there is an active Taskset associated with it. To see the full lead detail, simply click on the Lead 'card' to be taken to the Lead Enquiry program.

The **Lead Pipeline** program shows you at a glance the state of all Leads and Quotes in the Lynx system, for both Trade Counter Sale and Retail supply and fit opportunities. You can filter the list of opportunities shown by Account Manager, Date Range and Location (if you are using Lynx in multi-branch mode).

Where Tasksets are in use, you can also filter opportunities by the next action due - this lets you hone in on, say, leads awaiting a follow-up call or initial visit.

The Summary tab shows a summary of the filtered items by account manager, including conversion rates and the count of opportunities at each Taskset stage.

6 Managing Customers

Once you have agreed to do business with an individual or organization, you will need to create a Customer record for them in Lynx. The information held for customers is very similar to that for Leads, so this section focuses on the differences. If you have not read the 'Managing Leads' section, it is highly recommend that you do so first as this section will not repeat any of the features that are common, such as creating Attachments and Notes.

6.1 Create a Customer Record

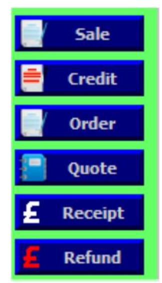
As described above, Customers can be converted from existing Leads, or they can be created from scratch by using the **Customers->New Customer** program. This follows essentially the same process as Lead creation, with some additional fields needed to manage the account in the sales ledger.

As with Leads, you can have a Taskset fire automatically when a Customer record is created. You may wish to do this, for example, to trigger the generation of a welcome letter or follow-up Email advising their account number, or perhaps an initial visit a few days after their account is opened.

6.2 The Customer Enquiry Screen

Again, the Customer Enquiry program is very similar to the Lead Enquiry, though there are some additional status fields, and more informational tabs, including lists of orders and sales ledger transactions.

The Customer 'Quick Menu'



For users of the Counter Module, there are quick links to the main trade counter programs to save you having to navigate via the main menu.

This makes it a straightforward process to locate a customer's details, check the account status and then proceed to enter a transaction.

Note that the 'Quote' program linked to here is the Counter Quote (for supply only), as opposed to a Retail Quote which is associated with a supply and fit Project.

6.3 Edit a Customer Record

All the Customer details previously entered can be edited by clicking the 'Edit' button in the Customer Enquiry screen, which also allows the Account Status and Finance Status to be modified, but only by users in the 'Finance' role.

Unlike Leads, there is no 'Delete' button as this function is performed by the Account Status.

7 Printing from Lynx

Printing from any web-based system presents some challenges, since browsers do not support printing under the control of the server, to prevent rogue web sites from 'spamming' users with printouts that they cannot control.

Lynx will allow you to print to a direct-connected printer if you are running the software on your own server. To do this you need to click on the 'Printers' link at the top right of any Lynx page, and select the printer from the list shown. You can set up separate printers for general printing and for dedicated bar-code label output.

If you are in the majority and not running Lynx on your own server, you can print in one of two ways:-

i) Select the "PDF to screen printer" from the drop down list in the 'Printers' program. When this is selected, printouts will appear as PDF files in your browser. You can then download or open these and print them locally or store them on disc as you wish.

ii) If you have an HP 'E-Print' enabled printer, you can print to it by setting up the Lynx E-print service. HP offers a range of E-print capable devices, from about £50 upwards. IFCon will be pleased to advise on the suitability of any device if you are in doubt.

7.1 Lynx E-print Maintenance

To set up an E-Printer in Lynx, you use the **Admin->Tables->E Printer Setup** program. This presents a simple grid in which you can set up one or more E-Printers using a special E-mail address assigned to your particular printer by HP – something like 99bbfx99cde@hpeprint.com.

Once you have created your E-printer record in Lynx, it will appear in the drop-down selection list in the 'Printers' program.

7.2 Report Printing

The standard Lynx reports are E-print enabled. Simply select 'Printer' as the output format in the report parameters form (this is the last field in the parameter setup for every report). This will then let you select any of your E-printers as the destination for your output, defaulting to your normal report printer.

8. The Lynx Calendar

Many of the functions in Lynx interface directly into the Calendar. The Calendar is a powerful tool that not only lets you see what's going on in your business, but which also lets you directly manipulate the timing of appointments and project installation.

The calendar system allows you to designate working and non-working days, either for the whole company or by individual. It can also be linked to a Google Calendar, enabling two-way synchronization of calendar events.

You can get to the calendar from a number of places, but the easiest way is to click the calendar icon available at the top-right of every Lynx screen.

8.1 The Calendar Program

When you start the calendar, it will by default show you your own personal calendar for the current month. To change the month, you can use the << Prev and Next >> buttons. You can also select another person using the drop-down list.

To change the date you are looking at, enter a new date in the date field and clicking on the 'go to' link at the top of the screen:

To look at a weekly or daily calendar, use the calendar timeframe selector icons at the top-right of the screen:

Monthly Calendar

Weekly Calendar

Daily Calendar

For the weekly and daily calendars, you can show several users' calendars next to each other on the screen. You can quickly select groups of users using the group drop-down. The users in the selected group will appear on the screen next to the group drop down, and you can select or deselect group members by checking or unchecking the box next to their name. Group: Personal

Working days for the current month are shown with a white background, working days for the previous or following month in light grey, and non-working days in light pink.

To display a list of unassigned appointments, check the 'Show Unassigned' box at the top right of the calendar screen.

When you move to another screen in Lynx and return to the calendar, it will remember where you were and restore the calendar view you were looking at.

8.2 Creating and Editing Appointments

To create a new appointment, double click on any working day in the calendar display. To edit an existing appointment, click on the appointment title, immediately to the right of the appointment time.

In either case, you will see an appointment edit box which you can use to enter or alter the appointment details. Dates are entered in DD/MM/YYYY format, start times and durations are entered as HH:MM. Alternatively you can use the date picker icon to change the date.

If you check the 'All Day' box, you will not be required to enter a start time and the duration will need to be a whole number of days.

Click the Update button to create or amend the appointment. You can use the Unassign button to take the appointment off the calendar on which it sits and put it on the unassigned appointments list. The Delete button will permanently delete the appointment.

You can enter anything you like into the Comments box on the appointment. The contents of this field will be shown as part of the 'tooltip' when you hover your mouse over an appointment, and on the lead, customer and service call printouts as part of the history.

The 'Copy' checkbox causes the calendar entry to be saved as a NEW entry on the calendar, rather than updating the existing one. This is a quick way to replicate an existing appointment on another day – open it, edit the date, click 'Copy' and save. All associated link information and comments are preserved.

8.3 Drag and Drop

You can move a calendar entry from one day or time to another by clicking and dragging it to another working day or time. To do this, be sure to click on the appointment title next to the appointment time.

You can drag and drop items within the same calendar, or move items from one person's calendar to another in this way. When you drop the calendar item, it will start on the day or time your mouse is over when you release the mouse button. Multi-day appointments will end after the number of days indicated, but will skip over non-working days for the calendar user selected.

Note that when you drag and drop an event with a 'team' attached to it, if the person on whose calendar the event is being dropped is not part of the current team, they will be added to the team and all existing members will be retained except the one from whose calendar the appointment is being dragged. To remove any team member, simply edit the entry and uncheck their name.

8.4 Calendar Links

Where calendar appointments are linked to another item, such as a customer or project, a blue link is displayed, showing a summary of the linked item. If you hold your mouse cursor over this link, it will show you a bit more information as a 'tool-tip', including usually a full address.

Clicking on the link will take you to the appropriate enquiry program for the linked item, which means navigating to and from the calendar is very rapid. You can then use the back button to return to the Calendar at exactly the same position.

8.5 The Delivery Calendar

Lynx has a special calendar for deliveries, which is available in the Monthly and Weekly views. Sales Orders appear on this calendar on their scheduled delivery date, which can be changed my dragging the delivery item to another date.

8.6 Calendar Linkage

As with the delivery calendar, Lynx automatically updates linked events in other parts of the system. Thus when you reschedule a fitting appointment, the fitting date and associated project billing are automatically updated at the same time. Similarly, last purchasing dates for products will be adjusted.

This powerful feature enables you to schedule resources and time without having to update several different parts of the system.

8.7 Holidays and working Time

Lynx has a single company-wide calendar and individual calendars which can be used to keep track of staff availability.

The normal working days for a Lynx user are saved on their user record, and can be amended at any time using the **Admin->Tables->Edit User** program. Simply hold down CTRL and click on the appropriate weekdays to select or deselect them.

The **Holiday->Tables->Holiday/Working Time Admin** program lets you set up and maintain the list of company and personal holidays. Select the year you are interested in from the drop down, and either the company calendar or the name of the person whose details you want to edit.

You indicate the date range for the holiday (or extra working period) using the start and end date fields, then indicate whether this period is a holiday (which will be shown in red on the calendar grid) or an extra working day (shown in green). Company holidays will override users' normal working days, but their personal holiday/working day dates will take precedence after company holidays are applied.

8.8 Printing

Any of the Lynx calendar views can be printed using the calendar print button at the top-right of each calendar screen. Click on this button to generate a PDF file containing the current calendar view.

You can also use the 'Schedule' button to print a Daily Schedule for user. This generates a PDF containing a summary page of all appointments for the day, followed by a detailed information sheet for every Lead, Customer or Service Call appointment, including contact details, a Google map of the area and notes. This is a very quick way to compile all the information a field-based person needs for their working day.

8.9 Google Calendar Sync

You can synchronize your personal calendar with your Google Calendar by setting up the Google access details in the **Admin->Edit Users** program. This simply requires your Google account credentials and the name of the calendar to be synchronized. It is recommended that you set up a separate Google Calendar for this purpose.

The Google calendar used to sync MUST use GMT as the time zone. If you synchronize the Google calendar with other apps please be aware they will also need to be GMT rather than BST based or appointments may show an hour out.

When events are added to your Google Calendar, they will appear in your Lynx Calendar as it is refreshed. Changes and deletes in the Google Calendar will similarly be reflected in Lynx.

When you first access your calendar after setting up the Google link information, existing appointments in Lynx will be copied to your Google calendar. Note that events older than 45 days in the past will not be replicated. Going forward, all new and amended Lynx events will then be updated on your Google calendar and will carry some information about any event links (customer name, for example) in the Google event comments.

The Google Calendar facilities should be considered a 'Beta' release at this stage, and may be subject to substantial revision in the future.

Note that repeated appointments are not currently supported.

9. System Administration

Lynx is designed to require a minimum of administrative work, but it may be helpful to do some ‘housekeeping’ on a periodic basis to make some programs easier to use.

The Lynx **Admin->System Cleanup** program lets you delete several items of old information from the database, including completed to-do items, dead leads and so-on. It is worth running this every week or two to help keep things running smoothly.

System Log entries are automatically removed after 30 days (these let you see who has done what on the system).