Lynx Extranet (WindowNet)

Revision 1.0

May 2018

Overview

The Lynx Extranet system is an optional component of the 'Pro' version of Lynx which lets leads and customers log in to a separate Internet domain, windownet.co.uk. and view details of their orders, account, appointments and documents such as quotations and invoices.

The extranet is a separate chargeable component, and must be switched on for you by IFCon. As part of this process, some customisation is required, and optionally you can integrate the extranet with your existing web site.

Customer Access

Customers access the extranet using their Email address. They can either access the system directly at [https://www.windownet.uk/*systemname*/en](https://www.windownet.uk/systemname/en) (where *systemname* is your Lynx system code) or via a link embedded in your own web site. On first login, the extranet checks that the Email address given corresponds to a customer or lead in Lynx, then Emails an initial password to the customer at the address given. They can then log in with the (temporary) password. This can be changed on the site to something more memorable.

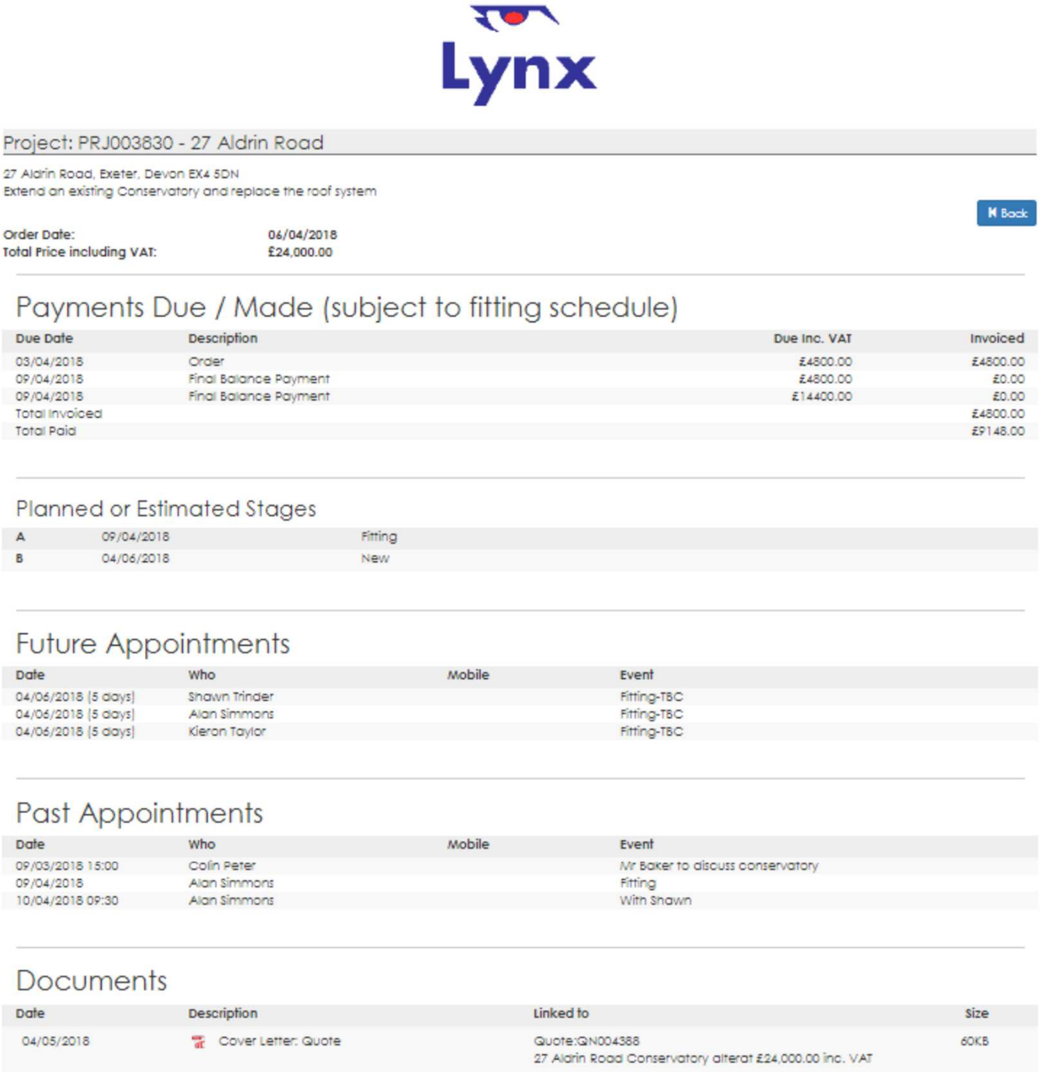
Once logged in, the customer will see a simple screen similar to the example below that allows them to view their orders, documents, their account and diary appointments. The section where the logo is customisable and can include additional text etc.

My Orders

Both Project (supply and fit) orders and supply only orders are shown on the My Orders screen in list format.

The customer can then drill down into individual orders and see the detail. This will include the state of payments against the order, and fitting dates / appointments set and any attached documents (which they can click on and download).

Note that you are in complete control of what documents and staff details are visible. This is explained in more detail below.


Lynx

Project: PRJ003830 - 27 Aldrin Road

27 Aldrin Road, Exeter, Devon EX4 5DN
Extend an existing Conservatory and replace the roof system

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Order Date:	06/04/2018
Total Price including VAT:	£24,000.00

Payments Due / Made (subject to fitting schedule)

Due Date	Description	Due Inc. VAT	Invoiced
03/04/2018	Order	£4800.00	£4800.00
09/04/2018	Final Balance Payment	£4800.00	£0.00
09/04/2018	Final Balance Payment	£14400.00	£0.00
Total Invoiced			£4800.00
Total Paid			£9148.00

Planned or Estimated Stages

A	09/04/2018	Fitting
B	04/06/2018	New

Future Appointments

Date	Who	Mobile	Event
04/06/2018 (5 days)	Shawn Trinder		Fitting-TBC
04/06/2018 (5 days)	Alan Simmons		Fitting-TBC
04/06/2018 (5 days)	Kieron Taylor		Fitting-TBC

Past Appointments

Date	Who	Mobile	Event
09/03/2018 15:00	Colin Peter		Mr Baker to discuss conservatory
09/04/2018	Alan Simmons		Fitting
10/04/2018 09:30	Alan Simmons		With Shawn

Documents

Date	Description	Linked to	Size
04/05/2018	Cover Letter: Quote	Quote:QN004388 27 Aldrin Road Conservatory alterat £24,000.00 inc. VAT	60KB

My Documents

Customers can see a complete list of all documents to which they have access. Clicking on these will allow them to download the original document or file.

Each document in Lynx is marked as to whether or not it is visible to the customer. Then you look at the attachments tab for a customer, lead, project etc. you will see a check box next to each, indicating whether or not the associated customer is allowed to view it. If this is unchecked, it will not appear on the extranet.

By invoices, credits and receipts will be flagged as customer visible, as will any document which has been sent from Lynx to the customer. You can still override this from within the associated Lynx attachment tab.

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Documents

Date	Description	Linked to	Size
04/05/2018	Cover Letter: Quote	Quote:QN004388 27 Aldrin Road Conservatory alterat £24,000.00 inc. VAT	60KB

My Account

This section shows the customer a summary of their account status, listing all invoices, credits and payments, as well as the current outstanding balance. If you have the Worldpay payments gateway enabled, the customer can also use this page to make payments by ticking the invoices to be paid and then the 'Pay Online' button.

Your Details: Mr Ian Finch

Address 25 Frobisher Way, Goring-by-Sea, Worthing, West Sussex BN12 6EU
Mobile 07850950550
Email ian@ianfinch.me

£ Pay Online

To make a payment, check the invoices you would like to make a payment against, and click the 'Pay Online' button

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Your Account

Date	Ref	Type	Your Ref	Amount	Outstanding	Pay
02/10/2019	TX005764	Receipt	WORLDPAY CA92	-36.00	-36.00	
01/10/2019	TX005761	Receipt	WORLDPAY EFF6	-12.00	-12.00	
01/10/2019	TX005760	Invoice	COUNTER SALE	12.00	0.00	
02/10/2019	TX005763	Invoice	COUNTER SALE	36.00	0.00	
02/10/2019	TX005765	Receipt	WORLDPAY 3508	-36.00	0.00	
02/10/2019	TX005766	Receipt	WORLDPAY C502	-12.00	0.00	
02/10/2019	TX005767	Invoice	COUNTER SALE	60.00	0.00	
02/10/2019	TX005768	Receipt	WORLDPAY 38B1	-3.00	0.00	
02/10/2019	TX005769	Receipt	WORLDPAY 143C	-100.00	0.00	
02/10/2019	TX005770	Receipt	WORLDPAY C917	-57.00	0.00	
02/10/2019	TX005771	Receipt	WORLDPAY 0198	-10.00	0.00	
02/10/2019	TX005762	Invoice	COUNTER SALE	24.00	14.00	☐
Account Balance					-34.00	

Online Payments

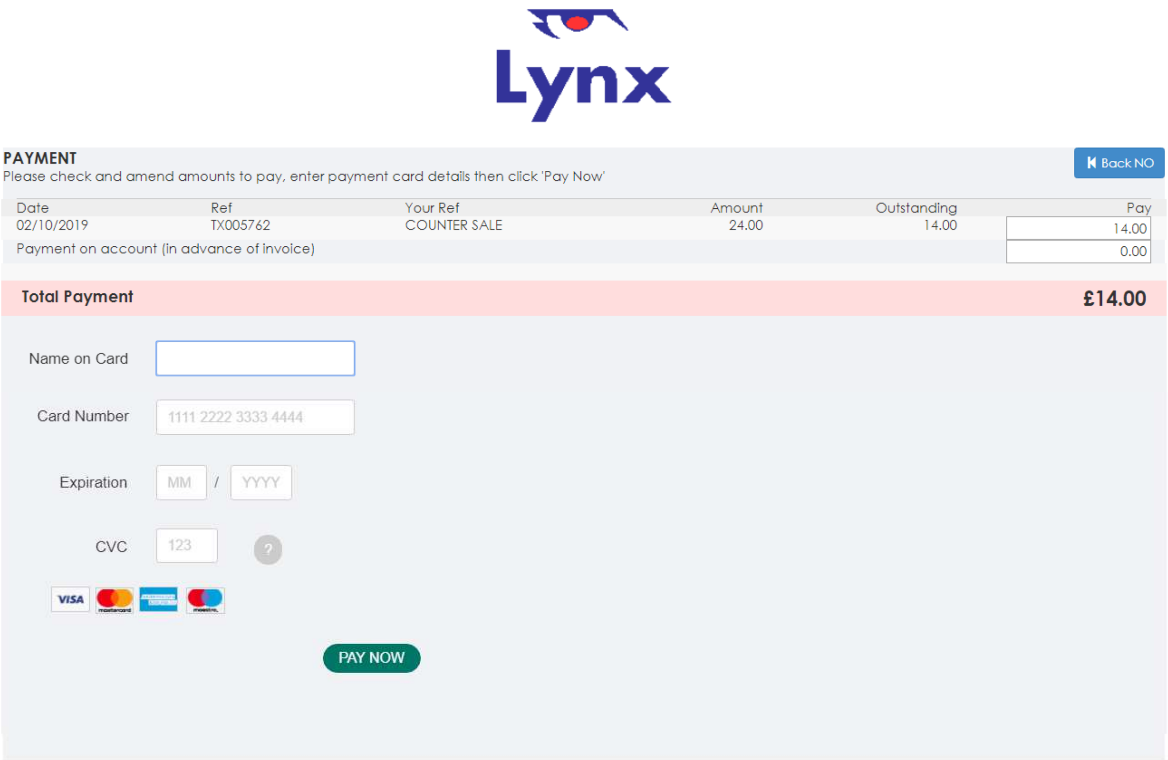
The online payments page can be accessed via the 'My Accounts' page or else by using a link sent out with an invoice, either embedded into the PDF file or in an accompanying Email.

Payments are made using a previously set up account with WorldPay. The embedded payment page element that captures credit card details is not hosted by Lynx, so there are no credit card scheme compliance requirements. Instead, Lynx receives a 'token' from WorldPay that is then used to pass the payment amount and other order details across. The embedded Worldpay form carries ut card number, expiry date and CVV validation.

WorldPay charges are currently 2.75% of the payment plus a flat monthly fee or per transaction charge, which is paid directly to hem using your Merchant Account.

When a customer pays, the payment is recorded as a receipt in Lynx using the payment type set up in the System Config and payment allocated to the invoice(s) being paid. Customers can also include an 'on account' amount which will be recorded as an unallocated payment.

Where a customer pays using a link, they do not have to have created an Extranet account previously. If non exists, one will be created automatically for them, and they will be emailed the login details as part of the payment process.



My Appointments

This shows a simple list of future and past appointments. Optionally, it shows the name of the staff member and their mobile phone number. This can be set for each staff member individually in the Edit User program.

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Future Appointments

Date	Who	Mobile	Event
04/06/2018 (5 days)	Shawn Trinder		Fitting-TBC
04/06/2018 (5 days)	Alan Simmons		Fitting-TBC
04/06/2018 (5 days)	Kieron Taylor		Fitting-TBC

Past Appointments

Date	Who	Mobile	Event
04/04/2017	Shawn Trinder		Fitting
08/05/2017 15:30	John Marks		Door to utility room
02/06/2017	Shawn Trinder		Fitting
02/03/2018 14:30	John Marks		SALES
05/03/2018 14:30	Colin Peter		survey
09/03/2018 15:00	Colin Peter		Mr Baker to discuss conservatory
09/04/2018	Alan Simmons		Fitting
09/04/2018 (4 days)	Shawn Trinder		Fitting- fascia works
09/04/2018 (4 days)	Mark Yapp		Fitting- fascia works
10/04/2018 09:30	Alan Simmons		With Shawn

Tools

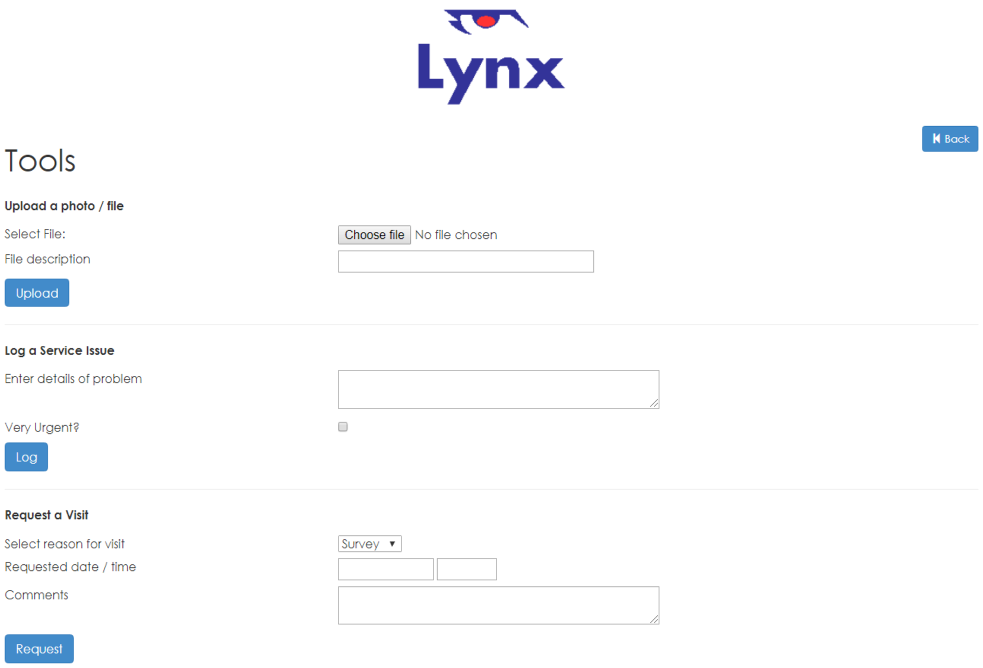
The Tools page has three functions, which allow users to upload a file, request a service call or request an appointment.

Uploaded files can be of any type, and will appear on the ‘Attachments’ tab of the customer or lead once uploaded.

Service call requests simply require the entry of a brief description of the problem. A tick box is provided to allow problems of an urgent nature to be indicated as such.

Appointment requests require the user to select a reason for the appointment, then a preferred date and time. Comments may also be entered.

When a file is uploads or a service call or appointment request logged, the customer will receive an Email to confirm that the information has been processed. This Email will be copied to the customer services Email address. At the same time, the event will be logged and will appear on the ‘Extranet’ tab for the customer/lead and also the Extranet Requests workflow, where the actions taken to deal with customer uploads and requests can be tracked in the form of a simple tick list.



Change Password

Customers are free to change their password at any time by quoting the existing password and selecting a new one.

Terms of Use

The terms of use page shows your web site terms of use. A basic boilerplate is supplied, however this is one of the elements of the system that needs to be set up when you start to use the extranet system.

Customisation and Set-up

A number of the elements of the extranet system visible to customers can be tailored. Each of the elements below needs to be set up prior to making the extranet system available to customers:

Header template

This is managed using the Edit HTML Template program in the Admin menu.

The contents of the template 'extranet_header' are displayed at the top of each of the extranet screens. This can be just your company logo, or include other text. You may well need help from, IFCon setting this up, as is the case with all the other templates.

Login template

This template ('extranet_login') contains the explanatory text that customers see when they log in. You may well not need to change the standard text.

Terms of Use template

This template ('extranet_terms') contains the terms of use for your customers. You may want to refer simply to your standard terms and conditions. The default content for this template is a very simple example of this, but will still need to me modified.

Payment Gateway

Switching on the payment gateway will require assistance from IFcon.

You will require a Worldpay merchat account, which can be set up using thelink below:

https://online.worldpay.com/signup/c0b36cea-87a3-4dae-8b4c-89b805e9c4d5

IFCon will then assist with the rest of the gateway configuration, including setting up security tokens and the payment form.

System Configuration

In the System Config program on the Admin menu, there are some parameters that you will need to review as part of the set up. These are all on the 'Extranet' tab.

Field	Description
CUSTOMER_EXTRANET_NAME	This is the name of your extranet system which will be included in Emails sent to the customer during the setup of their login. It should be set to something like "XYZ Company Limited Customer Extranet"
CUSTOMER_EXTRANET_URL	This is the base URL for your Extranet system. Generally the default version will be fine, but if you want to mask the 'windownet' URL, it may need to be altered to point to your own web site or a sub-domain on it. The parameter is therefore useful in the wider context of how the extranet will be linked into your own web site (if it is)
CUSTOMER_DOCLINK_URL	Similarly to the extranet base URL, this lets you customise the way document links appear to your customer in Email and SMS messages. It is worth considering whether customers will be more likely to click on a link with your domain name in it than one referring to 'windownet'. Having your own domain requires a little more set-up, but may be worth it in terms of customer confidence.
PAYMENTS_INVLINK_ENABLED	Allows customers to pay by link when set to 'Y', and enables the functions that will include the link in Trade Counter invoice Emails. For supply and fit invoices, the [payment_link] tag will need to be included in the appropriate letter template(s).
PAYMENTS_INVLINK_EMBED	Causes invoice PDF's to include the payment link when set to 'Y'

Appointment Information - User Records

When an appointment is shown in the extranet, by default the name of the user is shown with, optionally, their mobile phone number.

To change how this is displayed for each user, there are two check-boxes in the Edit User program which you can set. Their name is shown by default, but if you set uncheck the 'Name Visible box, '(TBA)' will be displayed instead. Mobile phone numbers are not shown unless you check the 'Mobile Visible' box. You may well want to set the latter for sales people, surveyors and lead fitters but not junior fitters or occasional staff.

Quote Document Alerting

Where a user is in the 'acmanger' role, you can have them receive an alert every time a document attached to a supply and fit quotation is viewed, either on the extranet itself or via an Email or SMS link.

To enable this, select either 'Email' or 'SMS' alerting from the 'Alert Quotes Read' drop-down.

The purpose of this field is to allow sales staff to quickly follow up on quotations that have been received and looked at by the customer, rather than having to ask if they have indeed seen the document.

Note that documents must be sent in Email as links to enable this functionality. There is no way to reliably track opening of a document attachment to an email.

Customising your own Web Site

You can if you wish provide customers with login access to the extranet via your own web site. There are two main components to this:

i) Creating a log in link which then takes the user to the extranet site. This can be done either as a hand-off to the www.windownet.uk domain, or by running the extranet site in what is known as an 'iframe'. Either of these approaches will require some amendment to your own web site code, which IFCon will be pleased to assist with.

ii) Creating a page on your web site to handle requests to view documents contained in Email to SMS links (See below). A sample page is available and which IFCon can provide to you r web site developer to enable seamless linking from your own domain.

Additionally, the extranet can have a customised 'style sheet' file so that text fonts and so-on match your own web site. This requires a little work by IFCon to create as part for the set up process, which we will be pleased to do in collaboration with your web site developer.

Email and SMS document Links

The extranet facilities include the ability to sent documents as links by Email or SMS message.

This feature is available on the 'Attachments' tab of the Lead, Customer and Project enquiries, among others. When selecting the 'Send' icon, you will additionally be given the option to send by SMS to recipients with a mobile number. If you send my Email, and additional 'Send Link' check-box will appear, allowing you to send a URL link rather than an email attachment.

When a customer receives either of these types of message, clicking on the link n their phone or computer will take them to the document itself, without any need to log in. Each document has a unique 35-character code that will make it almost impossible for someone without access to the link to guess a valid code.

Extranet Access Management

All accesses by your customers and leads to the Extranet system are logged. A new tab on the lead and customer enquiry programs will show you the detail of every access made, and this can be filtered by date range.

Additionally, the ‘General’ tab in each enquiry will show you when the extranet was last accessed.

Customers and leads are allowed to log in to the extranet by default, however you can prevent them doing so by un-checking the ‘Extranet Login’ box in the Edit Customer and Edit Lead screens.