Lynx Reporting Guide

Revision 3.1

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1 Overview

Lynx has a number of standard reports which are available from the report menu or which can be run on a schedule.

The reporting module uses a set of standard filters and sequencing options to enable you to obtain the information you need sources in the most appropriate way. Additionally, most reports are available either on screen, as a PDF file which you can then print out or as raw data which you can import into Microsoft excel or another program.

To run a report on screen, simply select it from the reports menu. You will be presented with a list of reform options, which typically included selection criteria such as a date range and sorting criteria such as name for account number sequencing. You will also be able to select the output format from a drop-down which allows HTML (on screen), PDF or data (Excel) delivery of results.

The report scheduler allows you to run reports on a specified date and time and have the results delivered by e-mail. To set up a schedule report, use the admin->scheduled reports program to select the report you wish to run, the filters and sorting criteria and the e-mail recipients.

Note that not all reports are included in the Fastrak edition.

2 Reports available

Lynx has the following reports available to run:

Sales Reports

Sales Invoiced or Ordered

This report shows you sales and credits summarized by customer for a given date range, either as invoice sales ordered sales, broken down by location if required.

Sales detail

This report is a more detailed version of the sales invoiced ordered report, showing you the individual transaction data and profitability. It also has more selection criteria and includes cost data where available. In 'invoiced' sales mode, costs are shown pro-rata to invoiced values for an order, so profitability is representative of overall levels being achieved.

Sales by product

This report shows you a breakdown of sales by product code.

Project profitability report

Shows you the profitability of individual products within a date range based on the date of order.

Project Fitting Value report

Gives you in effect a printed version of the Fitting Order Book and includes the total order value

Cash receipts report

This report details cash receipts by location and payment method for a given date range.

Sales VAT

Lists transactions for a given VAT quarter.

Unallocated Payments

Shows you cash and credit transactions which have not been allocated to an invoice.

Despatch Due

Details the supply-only orders due for despatch within a given date range.

Counter Quotes

List the supply-only ('counter') quotes issued for a period, showing the latest activity and value.

Counter Quote activity

Shows you counter quotes issued by user

General activity

Shows you general sales activity by user, including notes and to-do items created as well as the value of quotes issued. Users must be included in the 'Activity' role to be shown on the report.

Opportunity Pipeline

Shows you the Counter Quotes and quoted projects filtered by the assessment of the likelihood of winning them (you must have the Win likelihood fields set to 'Y' in the system configuration for quotes to appear). Note that only unexpired Counter Quotes and Project-related quotes less than three months old are shown, and only if an expected win date has been set.

Customer List
List customer 'master file' details (name, address, telephone etc).

Lead List
List lead 'master file' details

Inactive Customer
Shows you customers that have been inactive for a period of time, and marks them as inactive

Finance Reports

Debtors Report
List trade debtors, showing the ageing of outstanding amounts

Unallocated Payments
(see Sales Reports)

Work in Progress
Lists the value of supply-only and project orders yet to be fully invoiced and for which costs have been incurred.

Sales audit
Provides a list by customer of all sales transactions in a given date range

Sales Performance
For each location, shows the invoiced sales for the last week, last month, month to date and year to date, compared to the targets set.

Costings
Shows the value of estimated costs by product code against the corresponding sales values.

Credit Limit Review
This highlights accounts which trade regularly, and where the credit limit seems out of line with trading history. To be included on the report, customers must have done at least the minimum number of transactions specified, and at least the minimum revenue specified on average in each credit cycle (Week, month etc). The default values for these are set in the CREDIT_REVIEW_MIN_TXN and CREDIT_REVIEW_MIN_REV fields in the System Config (Finance tab)

Note that the credit limit is compared with the mean revenue in TWO cycles.

Order register
Provides a sequential list of order numbers for audit purposes

Transaction Register
Provides a sequential list of sales transaction numbers for audit purposes

Projects Reports

Snagging
Details all outstanding snagging items, including the amounts withheld by the customer.

Open Service Calls
List all Service Calls which have not been closed

Stock Reports

Stock Holding
Details the stock held by location and product code, including the valuation, optionally filtered by category.

Stock Movements
Details stock movements for a part or range of parts within a date range, with filters for location and part categories.

Purchasing Reports

Deliveries Due
Shows supplier deliveries due within a given date range for products ordered.

Deliveries Due
Shows supplier returns created within a given date range, allowing you to select all returns or just those that have not been returned or credited.

Deliveries Too Late
Shows all orders that are for a project and are due for receipt later than the site date

Stock Movements
(See stock reports)