Lynx Retail Project Management

Revision 4.0

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1 Overview

The Lynx Retail Project Management guide is the start point for those wishing to use the Lynx system for managing supply and fit projects for consumers, and smaller commercial projects.

The Lynx system provides the management tools to enable you to keep track of projects, build up costs and quotes, plan fitting, bill deposits and completed work and manage snagging tasks. These tools are integrated with the customer communication facilities described in the **'Getting Started with Lynx'** guide, easing the process of staying in touch with customers by letter, email and SMS.

The Lynx Calendar is also tightly linked to the Project Management process, which means for example that dragging a planned fitting on the Lynx Calendar will automatically reschedule the dates for generating invoices, saving work and potential embarrassment with customers.

To understand the Lynx process, it is worth studying the next section – Process Flow – which describes the Project lifecycle, and will provide the context for the individual process steps.

2 Process Flow

The Lynx Retail Project process flow begins with the creation of a Project. Projects can either be associated with existing customers or with leads. In other words, project records are created before a contract exists to carry out work. In Lynx, the term 'Project' is used where many businesses and individuals would use the word 'Job'. This is done to distinguish Projects from supply-only contracts (or 'jobs') where there is no element of labour involved.

A Project record exists to hold information about work to be carried out both before and after the contract is agreed. You can attach electronic documents, notes and to do items to Projects in the same way as you can for Leads and Customers. You can also attach specific information like costing and quotes using the built-in Lynx facilities. Projects and the orders they are associated with optionally carry the same number (highly recommended), making it easy to correlate with paper files and so-on.

Once a Project record has been created, you can optionally enter project costing information. This will enable you to determine the expected profitability of a project before a contract is struck. It is an optional stage, but one which nevertheless allows you to run your business in a disciplined way and to accurately predict the costs and profits associated with carrying out work.

The Lynx system also allows you to create detailed Quotes for a project. The process of creating a Quote is straightforward and builds upon the information stored in the Lynx parts table. By using a part code for each line of the Quote, it becomes possible to analyse subsequent sales into useful categories that enable you better to understand your business. The Lynx system enables you to create PDF documents from your Quote information, including covering letters which contained the summary quotation information and contracts for the end customer. The content of these PDF documents can be expanded by using the Quotes Library built into Lynx which is a sort of electronic filing Cabinet of documents which you would normally expect to include with a quote, such as your standard terms and conditions or product specifications. You can also include PDF documents you create yourself, such as technical drawings or photographs.

This means a complete Quote can be assembled and delivered electronically to your customers, saving time in the process and winning you more business by being able to respond more quickly to an enquiry, and in a very professional way. The combination of rapid quote creation and the ability to put your quote in the customer's hands quickly gives you an edge over your competitors.

Since customers often ask for variations on quotes, perhaps because they may only want part of a job done depending on price, Lynx allows you to create multiple versions of a 'base' quote, and then at a later stage to combine them. So, for example, if a customer asks for separate quotes for windows for the front of their house, with a separate quote for the front door, you can create these as separate options, change them around individually, and then combine them if the customer decides they would like all the work done at the same time.

Because the cost of a job relates to the exact make-up what is being supplied, the job costing section is linked to the quotes, so you can apply a 'tick list' of applicable items from your expected costs to any quote, enabling the margin to be calculated for each quote individually. Thus if costs change when you come to vary a quote, you don't need to re-key any previously entered cost information that still applies.

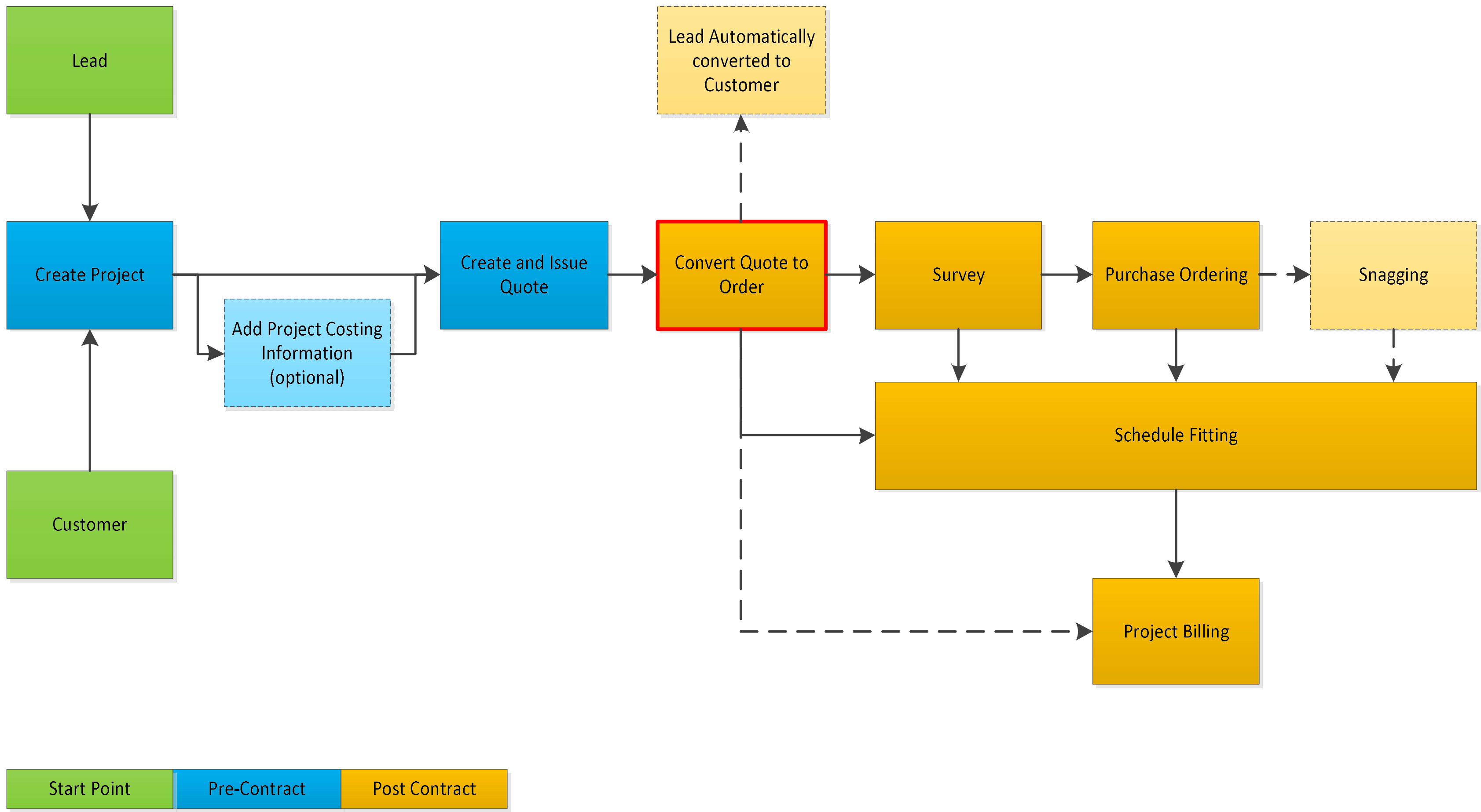
When a quote has been accepted by a prospective customer, Lynx gives you the facility instantly to convert the quote to an order. This includes changing any associated Lead record into a Customer with a minimum of data entry.

Any final survey, purchase ordering and / or fitting for the project associated with the converted quote can then be scheduled. Additionally, Lynx will prompt you to issue invoices at the appropriate times, building on either your standard billing model, or on the billing points specifically agreed for the project.

When your supplier invoices come in, and you have used other resources on completing the work involved with a project, you can attribute the costs directly to it, enabling you to track profitability on a project by project basis. Invoices entered in this way can then be exported in a format suitable for loading into your accounting system, such as Sage, without rekeying.

Please refer to the 'Lynx Retail Project Process Flow' diagram on the next page. This diagram provides a useful overview of the main steps between taking an enquiry and completing and billing a project. When learning the system, it will be useful to have this diagram to hand as a reminder.

The Lynx Retail Project Process Flow



3. Projects

Any prospective job becomes a project in Lynx when the interest from the Lead or Customer becomes sufficiently serious that it warrants costing and progressing to a quotation.

3.1 Creating Projects

Creation of the Project record can be done using the 

action button from either the Lead or Customer Enquiry programs. In most cases, you will use the Lead Enquiry as you won't have created a customer account for people you have not done business with before, but for repeat sales, you can go straight from the Customer Enquiry.

Creation of a Project requires just a few pieces of information, most of which default to values from the Lead or Customer record:

Field	Note
Project Type	Select the Project Type from the drop-down list (which you can change in the System Config screen). Note that for every Project Type, a Billing Model needs to be set up so that the Lynx system can calculate stage billing and allow invoice generation at the appropriate time.
Project Nickname	This is a short name for the project. It defaults to the first line of the Lead / Customer (Site) address.
Site address	Post Code, Building Number etc. These default to the Lead / Customer address values, but you can change them if the site is at a different address. As with the Lead / Customer setup, if you have subscribed to the PostcodeAnywhere service, you can use the automated address lookup.
Estimated Site Date	Enter an approximate date for work to begin. This is carried through to any Quotes you produce
Days On site	Similarly, enter an estimate of the number of days that work is expected to take. Both this field and the Estimated Site Date can be changed as you produce Quotes, and are not final until work scheduling takes place, typically after a site survey.
Project Summary	A brief summary of the project – for example 'Supply and fit four PVC windows'. Note that this field and the next two are not mandatory, but can be useful in preparing detailed quotes and contracts.
Works Description	Details of the work to be carried out – for example 'Remove existing windows to front elevation. Replace with PVC windows as specified. Make good in accordance with our standard terms'
Schedule Details	Details of the order in which things will take place – for example 'Day one on site: replace upper windows, Day two: replace ground floor and make good'

When you submit the Project set-up information, a new Project record will be created, carrying a unique Project Number. Click on the displayed link to review the Project details in the Project Enquiry program. Note that unless you are using the separate project numbering option, this number falls in the same sequence as the Sales Order numbers generated elsewhere in Lynx and when the Project is won, and contracts issued, this number remains the same and is used both to identify the Project and the associated contract to carry out the work. This is generally the best way to operate as numbering remains consistent across internal and external documentation.

Along with the Project record itself, a number of Project Stage records are created at the same time. Each Stage represents a specific phase of the work to be carried out. For example, a simple job expected to complete will probably have a single Project Stage. A complex build, with multiple fitting stages (and perhaps several billing points at the end of those stages may have 3,4, 5 or even more stage records created).The number created will depend on the Billing Model for the type of Project you have set up, and you can have as many different models as you wish. Typically, this will be at least two, for Window/Door contracts and Conservatories. The Stages created are identified as Stage A, Stage B and so-on.

Later on, if remedial work is required, Stages may be added for follow-up tasks. These 'Snagging' stages are identified by the letter 'Z' with a following number – Stage Z1, Stage Z2 etc.

For more information, see the **Billing Models** section in the **Getting Started with Lynx** guide or the program help.

3.2 Quick Quotes

One of the most powerful features of lynx is the quotation system. The main benefit of using lynx quotations is that the information provided to customers at quote stage is then carried through the system all the way to project billing. It may be, however, that you're happy with your existing quotation system and will prefer not to use the Lynx methodology. In this case, Lynx provides a "quick quotes" system to give you the benefits of information consistency without the need to use full Quotation process.

Quick quotes rely on a list of product codes being set up in your system configuration. This is a list of standard Lynx part codes which can then be used for sales analysis later. If these part codes are set up as bought in product types, creating the quick quote will also trigger purchasing.

Once the list of quick quote part codes has been created, whenever you create a new project, you will be prompted for a quick quote part code. Simply select one of the list of codes from the drop down box, and enter the net amount of your quotation. When you commit the creation of the project, links will now automatically also create a quotation.

There is no difference between a quotation created using the quick quotes methodology and any other quotation. You can edit quotations created in this way, re-quote them and so on. You can also attach any documentation created in a third party application to the Lynx quotation record.

3.3 The Project Enquiry

The Lynx Project Enquiry program allows you to access all the information about Project which has been started in Lynx. It has the usual attachment note and to-do tabs as well as other tabs which are more specific to projects.

These additional tabs are the stages tab the cost estimate tab and the quote details tab. The information shown on each of these is described in more detail below.

When you create Project records, you only need to enter the bare minimum of information. It is a good idea to supplement this with more detail, such as a summary of the project, a description of the work to be carried out and an overall description of the fitting schedule. To enter this information, click the edit button on the action bar for the project. This will also allow you to amend the Project Nickname and the associated Account Manager and Project manager for the project.

The stages tab

This tab shows you the details of the project stages which were created when the project was first set up. Each Stage of a Project is a separate phase of fitting, and is typically billed separately, either at the start or the end.

For each Stage, the stage identifying letter description and approximate or firm site date shown along with the estimated number of days that will be spent on site fitting. Additionally, if the Stage has been scheduled for fitting, the tab shows the resource calendar name for the assigned person or team that are expected to carry out the work.

The tab also allows you to see further details about the stage using the stage enquiry program. This is selected by clicking on the link from the stage letter.

New stages can also be added from this tab by using the add stage button. Alternatively, the entire programme of works can be edited in a grid format by clicking on the programme button. This approach is not generally required for simple projects, however maybe it may be useful for large-scale commercial projects with many Stages.

Note that if an additional Stage is added to a Project it will not affect the existing billing information. That is to say that the predetermined points at which invoices are due to be raised, for example at the commencement of fitting, will not be changed by adding a new project stage. Removing a project stage once it has been created is not possible in Lynx.

The cost estimate tab

The cost estimate tab shows you information about the expected costs for a Project. These may be made up of materials which have to be bough, the cost of fitting Labour, whether supplied by staff members or sub-contractors, other costs such as skip hire or rubbish removal and allowances for trims, glues or other similar materials which may be either purchased on an ad hoc basis or drawn from stocks.

To enter costing information click the 

button. This will bring up a data entry grid into which you can enter the expected costs to deliver the project. Items can be entered using either existing part codes which have been set up on the part code grid, or free-format. Costs for stock parts can either be based on average cost or ‘standard’ cost from the Parts Grid. This is controlled by the ‘PROJECT_COST_STDCOST’ field in the System Configuration.

For each line on the grid, a part code is required. If this does not match a part code on the part code grid, no action will be taken to fill in the description and other fields in the grid by Lynx. If however, the part code matches the existing parts table, the description, part type, and default quantities per unit will be prefilled using the part table information.

In addition to the part code and description, each line on the cost grid requires selection of a part type, which enables you to categorize the types of items to be purchased for the project. The part types of the same as those used in the main parts grid, as follows:-

Field	Note
MATERIALS	Physical raw materials to be used on the project, such as sand and cement, wood or plaster.
SPECIALS	Items such as tools or clothing, which are generally re-used rather than consumed)
BOUGHT IN	Items bought in complete from third parties to be fitted as part of the project.
FITTING	Fitting labour and other internal or sub-contract labour

The remaining fields to be filled in the cost per unit field, the quantity per purchase unit (in other words the quantity of items to be bought that is contained within normal unit of purchase such as number of screws in the box) and the actual quantity of items to be purchased. The program will automatically calculate the actual purchase quantity required and multiply this by the unit cost to give you the total cost of the items to be purchased.

The final 'All Quotes' tick box lets you select whether a cost is to apply to all quotes issues for the project, or will be individually selected for each quote. The box is ticked by default, which is the best approach for simple projects where you will not be issuing quotes which have different options in them (such as separate quotes for PVC and aluminium). Cost lines that are ticked will be included in the cost make-up of every quote for margin calculation and other purposes.

Additional rows can be added to the grid by clicking the add row button. Once all the required costs have been entered, click on the update button to save them. You can come back to the manual costings at any time via the project enquiry screen and amend them.

The Quote Details Tab

The Quote Details tab allows you to record details and prices quoted to the customer the carrying out the project. You can create as many different quotes as you wish for the project. Each time you re-quote, the previous quote information is used to pre-fill the new quote, enabling you to make small adjustments to prices and discounts without having to completely re-enter the quote.

The quote tab shows you a summary of each quote issued against the project, including pricing and a calculated margin based on the project cost estimate

To see more detail about an individual quote click on the quote number link in the list. The status field indicates whether the quote is alive expired or has been converted into a contract. This means that if there are multiple versions of quote for a customer for a project, you can refer back to the history of the quotes and be sure which was the final agreed price.

To create a new quote click on the New Quote button on the action bar. The rest of the quotation entry process is described below. Alternatively you can amend an existing quote by selecting the Requote button next to the quote summary.

Quotes can also be combined, so for example two separate quotes for windows and a front door could be turned into one ‘windows and door’ quote. To do this, tick the quotes which are to be combined and then click the Combine Selected button on the Quote Details tab of the Project Enquiry. You will be asked to enter a new Quote Summary and Customer Reference. The option is also provided to move existing attachments to the quotes being combined to the new quote. Finally, the billing breakdown of the combined quote is displayed (calculated using default values) and can be adjusted before combining.

The Purchases Tab

This tab allows you

The Attributes Tab

This tab allows you to mark the Projects having certain 'Attributes' that can be used later to search for similar Projects in the Project Attribute Search program.

Simply tick the attributes applicable to the project to set them.

Project attributes can be added from a list contained in the system configuration. Projects are automatically geo-coded as attributes are set. You can then use the Project Attribute Search to find projects with particular attributes (for example "Composite Door", “Astragal Bar", "Woodgrain") and see the top 20 closest matches to a given address on a map. Perfect for finding examples of your installations to show to prospective customers.

4. Retail Quotes

In Lynx, Retail Quotes are always associated with Projects, and are used to quote for supply and fit projects, where there is installation work to be carried out, as distinct from a supply-only contract in which products bought in or drawn from stock are simply sold as a profit. To raise a quote for a supply-only situation, use the “Counter Quote” program, which is described in the **Lynx Counter Transactions** guide.

By entering Quotation information in Lynx, and creating the documents your customers see using this information, you can eliminate the possibility of mistakes and ensure that you will always have to hand the details of quoted pricing for a customer.

4.1 Quotation Entry

To create a new quote for a project you can either click on the quote button on the front page of the project enquiry will go to the quote details tab and click on the quote button from there.

Entering a quote is quite similar to entering the costs for a project. You start by entering a summary of the quote, which will be used to identify it later if more than one quote is to be issued for a Project (e.g. “Windows”, “Front Door”) and an optional customer reference for the quote.

If you wish to price using an overall discount or mark-up, you can then tick one of the two checkboxes on the quotation entry screen and enter the appropriate percentage discount or mark-up. Next come the estimated lead time, which is the number of weeks it is expected to take from the point of order to the commencement of work, and the estimated number of days on site that the work is expected to take. These are only approximations, but can be used in your cover letters to give your customer a rough idea of when the work can go ahead.

The pricing information for the quote is entered line by line in a similar way to the project costs. For each detailed quote line you supply a part code which will be checked against the part database. Where a match is found, the description sales unit and selling price information are filled in for you. This information can also be entered freehand and all the fields can be over typed.

As you enter the quote details the total price is calculated and VAT added according to the current VAT rate and the VAT codes you select. (For more information about creating parts and VAT codes, please see the getting started with Lynx guide). The item quantity is normally multiplied by the price on each line, however if you leave the ‘Per’ field blank, this does not take place. This allows you show a price for, say, 4 windows that each have different selling prices, but where you want to show the total number of windows being quoted.

If you have selected an overall discount or mark-up, this will be shown on each line and will override anything you type into the discount field. To enter separate discounts for different lines on the Quote, you need to uncheck both the overall discount and overall mark-up.

You can also enter gross prices (including VAT) if you prefer. Simply tick the Enter Gross Prices checkbox. This can be turned on by default if you wish – set the QUOTE_GROSS field on the ‘Retail’ tab in the System Config program to ‘Y.

To delete a line from the Quote, simply click on the red cross shown at the end of each line. You will be asked to confirm line deletion before the information is removed.

The last section with a quotation entry screen contains the billing plan. This information indicates the points at which invoices should be raised. The values shown in the billing plan default to those that have been set up for the particular project type. Thus, for example, you can have default billing stages set up for a conservatory build which would be quite different for those used on a simple window or door job. You are free to amend the percentage is due at each stage of the project provided that the total does not some to more than 100%. If the total is less than 100%, the program calculates the retention field. This amount will become due upon completion of all fitting stages and any snagging on the project.

When you have finished entering a quotation details, click on the submit button to update the quotation database. Once a quotation has been saved in this way, you cannot amend it. However, you can create a new version of the quotation at any time. This will default to the most recent quotation details as mentioned above.

Each quotation is assigned a unique number. Clicking on the link from the quotation number in the project enquiry quote details tab will take you to quotation enquiry. From here you can do a number of things such as creating a detailed cover letter which will contain mail merged information from the quotation database. You can also create a contract document for the customer to sign.

4.2 Quote Enquiry

Details of an individual quote are displayed by selecting from the list in the Project Enquiry ‘Quote Details’ tab. In addition to a simple display of the quote information and the usual to do/notes/attachments tabs, the ‘Costs’ tab allows you to select which of the costs from the Project Cost Estimate apply to the quote, and to override them if appropriate.

Clicking on the tab shows you a list of the items on the Cost Estimate. Note that you cannot add estimated costs here – this has to be done from the ‘Cost Estimate’ tab on the Project Enquiry. If no cost estimate has been set up, a quick link is provided to the cost setup from this tab.

4.3 Quote Cover Letters

Once you have created a quote, you can use the powerful Lynx mail merge facilities to create a covering letter for your customer containing the details of the quote and attached to it documents from your quotation library. This enables you very quickly to create professional-looking quote documents which you can then e-mail or print and send to your prospective customer.

To create a quote cover letter from the project enquiry quotes information tab which will display the quote details. Note that the quote enquiry has the same attachment, notes and to-do tabs as all the other main enquiry programs in Lynx, enabling you to store all sorts of quote-related information. Start your cover letter, "quote cover" button.

A new edit window will open in your browser, showing the default quotation cover letter prefilled with information from the selected quote. The top left of the screen the template drop down box allows you to select from other quotation letter formats that you may have created. By default, when you create a new cover letter for a quote, any previous cover letter for that quote is used to pre-fill the edit window. This means that any customisation you have done to the letter will be preserved before you need to do is make small changes. If, however, you need to start the letter again from scratch, simply uncheck the "use previous cover letter content" box.

You can change the wording of the letter by simply typing in the edit window much as you would with a word processor. The formatting of the quotation letter, and the fields which have been included from the quote information, a determined by the quote letter template. These templates and managed using the same letter template facilities as the Lynx mail merge system. For more information about the system**,** please see the letters and mail merge section in the **Getting Started with Lynx guide.** This includes details of the mail merge fields that can be inserted into the quote cover document.

Underneath the main edit window, a list of available documents from the quotation library is shown. These should include your standard terms and conditions of sale and your main product brochures or fact sheets, which have been saved as PDF files. To include any of the library documents in your quotation letter, simply check the box beside them. Documents are listed in order of the description applied to them when they were uploaded into the quotation library. It is a good idea, therefore to label the documents with an initial a, B, C etc. so that they appear in the order you would wish in the quote cover letter program.

Additionally, if any documents have been attached to the quotation, these will be listed in the cover letter program. Again, simply check the box beside these to have them included in the cover letter. This enables you to use other programs to create technical drawings which you can then simply save as PDF files to include later as part of your quotation pack.

When you are happy with the contents of your cover letter, click the "generate PDF" button. Lynx will then create the cover letter in PDF format, and attach it to the quote. If you go to the attachments tab for the quote you can now download the letter for printing or e-mail it to your customer.

4.4 Contracts

The process of creating contract documents for a quotation is almost identical to that used in creating a quote, letter. The same edit window is presented and you can attach to your contract document any of the quotation library PDF files. Contract documents are always created from scratch, and by default use the "contract" template from the mail merge system.

The important point to note about generating contracts from the quote information is that you can be sure that the document the customer signs is consistent with the rest of the information in your system. This means that transcription errors and hand written amendments will not be a problem for your organisation.

Furthermore, as your contract documentation is both created and immediately stored in Lynx, you will never have a problem of tracking down the terms of the contract.

4.5 Quote Conversion

When your customer is happy with your quote and signs your contract, you can very quickly turn your quotation into an order within the Lynx system.

To do this, simply click the convert button on the action bar in the quotation enquiry program. If the quote is for an existing customer, this will immediately create a new sales order, which will be given a unique reference number that is displayed on-screen. If, however, the quote is associated with a Lead, you will be required to enter a little more information about the customer, including payment terms and any discount group that may apply to future transactions. Once these have been entered, the new order will again be created. Click on the order number link to go from here to the sales order enquiry program.

Note that the line details shown in a sales order created from a supply and fit quote in this way will be made up of the billing information rather than the products to be supplied. Thus, the lines on the order will correspond to the points at which you expect to invoice your customer, rather than the makeup of the products to be supplied. This information is, of course, always available to you by looking up the original quote.

5 Contract Progression

5.1 Scheduling

When you convert a quote in Lynx, you can have the system automatically schedule all the key tasks which need to take place in addition to fitting. This may include for example sending out customer copies of contract documents, arranging for surveys to take place, and sending out a thank you letter once work is complete.

To ensure key tasks are always remembered, set them up using a Task Set. Task sets are described in more detail in the **Getting Started with Lynx** guide**.** You should have **a** Task Set created for each of the main types of contract you carry out- typically this will be one task set for window and door contracts and a separate Task Set for conservatory contracts.

Creating a Task Set will mean that a number of to-do and/or appointment items are created each time a new sales order is stored on the system.

To-do items will appear for appropriate staff to carry out the related tasks on the to-do list accessed by clicking the to-do link at the top right of every Lynx screen. Note that to-do items created from Task Sets are not assigned specifically to one individual, but rather to a Lynx "role". This means that on the to-do list they appear after items due to be carried out specifically by the Lynx user accessing the list, and will be shown with a blank "assigned to" column.

Appointment items on the Task Set will be shown at the right hand side of the calendar program as "unscheduled events". To access the calendar program, click on the calendar icon at the top right of every Lynx screen.

You can filter the list of unscheduled events shown to specific roles by using the "show unassigned events for roles" drop down box. Thus, for example, you can restrict the unscheduled events shown to just those relating to surveys or fitting. A daily check should be made that all survey appointments due to be scheduled have been put on the calendar.

To put in unscheduled event in the diary for an individual or fitting team, ensure that you have their calendar selected on-screen (you can use the "calendar" drop-down field to select the appropriate person or team) then drag the event from the unscheduled events section to the calendar on the date you wish.

Fitting can be scheduled as described above, or alternatively directly from the project enquiry. If you go to the project enquiry "Stages" tab, you will see a ‘Schedule Now’ link beside any stage which needs to be scheduled. Click on the link to open the Calendar program. You can now select the appropriate person or fitting team’s calendar, and double-click on the start date for the fitting work. This will bring up a small window pre-filled with the fitting details which you can adjust if you wish. Click the “Update” button to save the appointment in the calendar. This will automatically update the project stage details and any schedule associated billing that needs to take place.

A third method of scheduling is to use the project scheduling workflow program. This shows you a list of all unscheduled fitting work across all projects and allows you to die arise the work by clicking on the schedule link. This operates in the same way as the link from the project enquiry program. It is a good idea to review this workflow daily to ensure that all work which can be planned fitting is on the diary.

5.2 Works Orders

The 'Pro' version of Lynx lets you set up a special type of Purchase order, called a 'Works Order'. These are used to specify the fitting work to be carried out on a Project Stage, and in the case of sub-contract labour, the price for the work.

Works Orders can be set up from the Show Stage program (follow the link to the Stage letter from the Stages tab in the Show Project screen), or the Event Edit screen in the calendar, where the event is linked to a Project Stage.

Lynx lets you create three types of Works Order:

- For internal fitters who are not paid as suppliers. In this case, the Works Order is unpriced.
- For regular subcontractors who have both a Lynx user ID AND a supplier account. In this case, their user record must have the supplier account field set and the corresponding supplier record must be marked as a 'Fitting Supplier'.
- For occasional suppliers who do not have a Lynx user ID (and who must also be marked as 'Fitting' suppliers

Note that subcontractors who have no Lynx user ID will have their appointments shown on the 'SUBCONTRACTOR' calendar, which appears when you select the 'Fitters' group in the weekly and daily calendar formats.

All subcontractors (with or without a Lynx user ID) can have default prices set up for fitting work on their supplier record. This is done in the 'Show Supplier' screen, where the Supplier has been marked as a 'Fitting Supplier'.

Works Orders behave like other Purchase Orders in that you can Email them out, add attachments and notes and cancel them. Unlike other Purchase Orders for goods, they cannot be marked as received, but instead can be flagged as 'Complete' once the work is done using the Show Purchase Order screen. Invoices can be received against them in the Job Cost screen in the normal way.

5.3 Project Billing

The process of Project billing in Lynx is very straightforward, and is managed using the **Projects -> Project Billing** program.

The program displays the list of all projects that are due to have invoices raised against them, detailing the reason for the invoice (Bill point) the date on which the invoice is or was due to be raised and the invoice amount. Where amounts have been withheld at the end of the project for snagging, this value is also shown, and will be deducted from the amount to be invoiced.

To create an invoice, simply click the invoice button in the right hand column on the same line as the corresponding project. This will bring up a new "raise project invoice" window which will allow you to select the billing items to be included on the invoice and to amend the amounts. Click on the select check box for each line to be included this will enter the amount left to invoice for that line in the "gross amounts to invoice" field, which you are then free to amend. Note that you cannot enter an amount in this field which is greater than the calculated amount left to invoice. As you select lines and optionally amend the amounts to be invoiced are running invoice total, inclusive of VAT, is calculated and displayed.

When you have finished selecting lines for the contract, click the "raise invoice" button. This will create an invoice record and generate a new, unique, invoice number. Depending on your printer setup, the program will next either display the invoice PDF document on-screen for you to print or print it directly. If the customer has an e-mail address on file, a copy of the invoice will automatically be sent in PDF format to that e-mail address.

The Project billing program will only show you items which are due for immediate billing. This means items which are due on signature or commencement of a fitting stage which is due to start or finish on or before today. This means that you do not have to keep a separate record of when items are due to be built as the Project billing screen will show you everything due for immediate action. Note that Project billing due on stage completion will appear on the Project billing screen on the commencement date of the stage. This is because it is often useful to have fitters present an invoice to the customer so that they can obtain payment on the final day fitting before leaving site.

Note that once you have raised an invoice for a project that you will no longer be able to change the pricing. For this, you will need to raise a Contract Variation. See the section on Contract Variations below.

5.4 Snagging

The Lynx system deals with snagging by creating additional project stages for the snagging tasks to be carried out. Snagging stages are scheduled in exactly the same way as normal fitting.

To create a snagging stage for a project, click on the "snagging" button on the project enquiry. This will open the project snagging program.

The program will list the stages on the project for you to select from. Click on the “select” radio button next to the appropriate stage.

Next, enter the approximate amount of time it is expected to take to carry out the remedial works, and any amount which has been withheld by the customer until these are complete.

You can now enter details of the specific tasks to be carried out to complete the contract. Click on the "add line" button to add more snagging tasks. When this is complete, click the “Submit” button. This will cause a new stage to be added to the project, identified by the letter "Z" followed by the number. Thus if there is more than one snagging stage for a project they will be numbered Z1, Z2 etc. click on the displayed stage number to go to the stage enquiry. The stage enquiry for snagging stages shows you the detailed tasks to be carried out.

From here, you can immediately schedule the work or alternatively leave it for scheduling via the calendar/unscheduled events method or from the project enquiry,

Once a snagging stage has been scheduled, it will appear in the **Projects->Snagging Workflow** program to be checked off as complete. This program shows you, project stage by project stage, all snagging tasks remaining to be completed. The fitting team who has carried out the work using the drop down at the top of the screen. You then simply enter the actual date of completion, and tick the "complete" check box next to the task. This will update the associated tasks on the snagging stage, and ensure you have a complete record of what work was done by whom and when which will expedite the process of payment from the customer.

If you need to add a snagging items, you can do this at any time by creating a new snagging stage on the project.

5.5 Service Calls

When projects are complete, Lynx allows you to track customer requests the service using the inbuilt service call system.

To create a new service call, use the 

button on the Project Enquiry program. The new service call entry program allows you to enter the basic details of the problem reported by the customer. You can either use the standard customer contact details, or by unchecking the "use above contact details" button you can enter alternative contact information. This is useful if, for example you need to contact the talent of a property to arrange a service call where the original work has been paid for by their landlord.

Check the "urgent problem" box if the issue reported by the customer requires immediate action. This will cause the service call to appear at the top of the list in the service call workflow and on the homepage service calls section.

When you submit the form, Lynx will create the basic service call record. Each service call is given a unique number. Follow the link from the service call ID number to the service call enquiry program. This has most of the standard facilities available in other enquiries, including a service call print button which will generate a PDF summary of the service call, including a Google location map and history. This is the ideal document to give to your service engineer to take to site.

From the service call enquiry program, you can add to-do tasks and appointments to the service call by using the action buttons. You also have the ability to create notes and attachments, send SMS messages or generate customer letters directly from this screen.

As a service call to-do items and appointments are created, they will appear in the service call history shown in the "General" tab on the service call enquiry. This gives you a complete picture of what has taken place in response to the call and what actions are still due. Assigning these to-do items to individuals and scheduling any associated appointments is carried out in the normal way.

The **Projects->Service Workflow** program provides an overview of all result service calls in the system. Click on the service call ID on the left-hand side of the screen to jump to the service call enquiry program.

When a service call is complete, click on the "close" button on the action bar in the service call enquiry program to take it off the list of outstanding calls.

5.6 Job Costs

The process for entering actual costs against jobs is identical to that for supply-only work, and is covered in the 'Lynx – Counter Transactions' guide.

5.7 Cancelling contracts

Once created, contracts can be cancelled from the Project Enquiry program. The "cancel contract" button will Mark the contract has cancelled and prevent further action, including billing. You can get to the sales order enquiry program from either the "projects" or "counter" menus, or link to it from the customer or project enquiry programs.

5.8 Warranty information

Lynx enables you to store warranty information against each contract on the system. To do this, go to the sales order enquiry program, and click the "warranty" button. This will bring up a new window which will allow you to select the warranty supplier from your supplier table, and enter the contract specific warranty reference number. Click on submit to save this information. If it has been entered previously, the warranty information window will allow you to amend the warranty details.

5.9 Self Certification Information

Lynx allows you to record information sent to a third-party "Self Certification" or "Competent Person" scheme, such as FENSA. The name of the scheme in use and other configuration information is contained in the **Admin->System Config** screen ("SELF_CERT_SCHEME") etc. on the 'Retail' tab, and must be set up before the feature is enabled.

To record installation information, click on the button showing the name of the configure scheme on the action bar on the Project Enquiry screen and enter the data in the pop-up window.

5.10 Reputation Scheme Information

Similarly you can record details of schemes designed to establish your bona-fides as a Contractor – most commonly like 'Checkatrade'. The name of the scheme in is contained in the **Admin->System Config** screen ("REPUTATION_SCHEME"). This name will appear in the on-screen button to enter the relevant information.

5.11 Contract Variations

Once invoicing has begun on a Project in Lynx, you can no longer change the pricing. To enable you to reflect changes in what is agreed with the Customer, you will need to create a contract Variation instead, by clicking on the 'Variation' button on the Action Bar in the Show Project screen.

The Contract Variation program allows you to enter the summary and detailed descriptions of the change to the contract – additional products or works, for example – and to enter the price change that you have proposed. Once these are agreed with the customer, you convert the Variation to agreed status, and the associated order and billing records are updated appropriately.

The Contract Variations feature also lets you create templated letters to send to your customer, confirming the changes in writing. You can use this to generate a document for signature by the customer if required.

5.12 Cancelled Projects

If a customer cancels a job, the work required to leave the Project record in the correct state will depend on what has happened previously. The following process should help you keep things straight:

i) If the job has not been converted and is definitely a 'lost sale' (for example if the householder has purchased from another company and told you so), you can use the 'Lost' button on the Project Enquiry to record the fact, and also track the reason the sale was lost.

ii) If the job has been converted but no deposit or other invoice has been raised, as may happen in the case of a householder changing their mind or being unable to go ahead, the 'Cancel' button on the Project Enquiry should be used. This will mark the Project as deleted and all associated quotes as dead. You can still use the 'Reactivate' button if circumstances change in the future to put the Project back into Estimate status.

iii) If the job has been converted and one or more invoices have been raised, the following steps will depend on the circumstances of the cancellation.

   At the simplest level, if **the customer deposit is forfeit** and you are simply not going to carry out any more work o the project, you can tick the 'Fully Billed' field in the Project Enquiry screen. This will prevent the project from appearing on any workflow screens. You should also update the Progress Phase to 'Dead'.

   The above will also apply if there is to be some sort of **partial refund of the deposit or other monies paid**. Under these circumstances, however, you will also need to raise a Counter Credit on the customer account for any partial refund of the deposit, stage payments or fitting.

   If the **invoices raised against the project to date are to be fully credited**, the strongly preferred approach is the same as a partial refund above – the customer credit will simply be the same as the amount invoiced to date and any cash received can simply be refunded. This has the benefit of keeping an audit trail of what has happened. You do, however, have the choice of deleting the invoices in this case if you wish. To do so, go into the Project Enquiry and process each invoice and receipt to be deleted in turn from the Accounts tab. You will need to click on the link to the transaction, which will take you into the Sales Transaction enquiry. If any payments have been allocated to an invoice, you will first need to go into the allocations tab, click on the link to each individual allocation and then delete it. Once this has been done for each allocation, you can go back to the Sales Transaction enquiry, click on the edit button and then delete the invoice or receipt. You will need to have the ‘Finance’, ’Finmanager’ or ‘Admin’ role enabled on your User record to do this. Once the invoices are deleted, go back to the Project Enquiry and the ‘Cancel’ button will be available to delete the Project.

Always bear in mind when deleting invoices and receipts that they may have been entered on your accounts system, which will therefore also need appropriate adjustment.