

Neilon Project Management User Guide

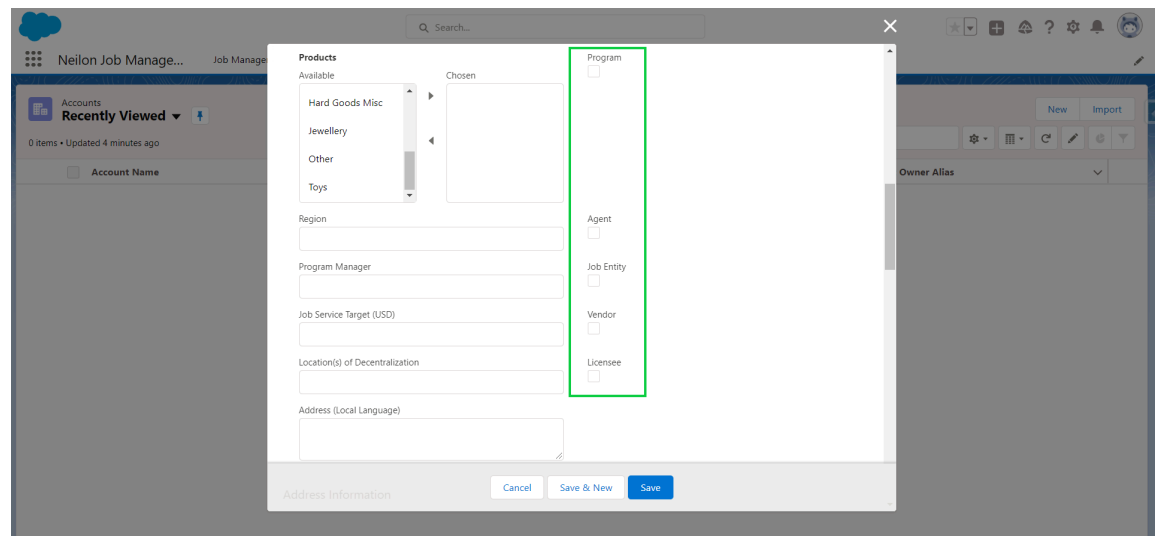
Introduction

This document is prepared specially for end users of your Salesforce org to use features of Neilon Project Management.

• Create New Customer

Customers are the accounts who have requested for the projects or jobs or whom you will provide the services. Follow below steps to create new customers

1. Open App Launcher > **Accounts** tab
2. Click the standard **New** button
3. Account must be Program, Vendor, Agent, Licensee, or Job Entity. Make sure, you check atleast one of these checkboxes. Refer to the below image.



4. Country cannot be empty for program or job entity accounts. Make sure you enter the **Billing Country** for those types of accounts.

• Create New Job Service Definition

Job Service Definitions is a list of services you provide to your various customers. You can assign these Job Service Definitions to your various jobs. Follow below steps to create a new Job Service Definition.

1. Open App Launcher > **Job Service Definitions** tab
2. Click the standard **New** button
3. Provide Name, Sub Categories. Select checkboxes to set type of Service. Check On-Site? If the service needs to be performed on-site.

4. Click **Save**

● Search Jobs

A job is a group of services which will be performed for a customer. You can search and filter your existing jobs from the **Job Manager** tab

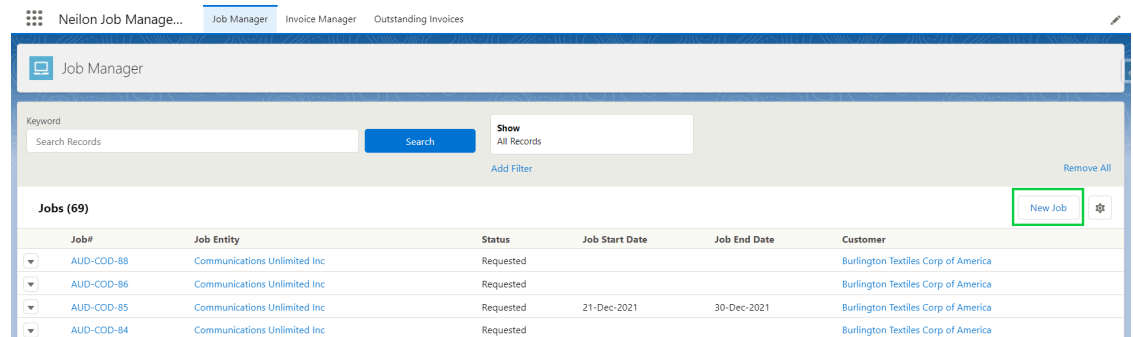
Click on **Add Filter** to set filter criteria for jobs.

After criteria is selected, click Done and Apply Filter

- **Create New Job**

You can create multiple jobs for the same customer. A job can be requested by Customer, Agent, Vendor, Licensee or any other third party. Before you create, make sure account records are created for respective Customer, Agent, Vendor, Licensee or other third party. Follow below steps to create a new job.

1. Open App Launcher > Neilon Job Management
2. Open **Job Manager** tab
3. Click the **New Job** button



4. Add appropriate Job details like Job Number, Job Status, Job Start Date, Job End Date, Job Due Date etc.
5. Select a customer account as **Customer** and a job entity account as **Job Entity**. These two are required fields.

The screenshot shows the 'New Job' form. It has four main sections: 'Customer', 'Vendor', 'Job Entity', and 'Agent'. Each section has a 'Search Accounts...' field and a 'Search Contacts...' field. The 'Customer' and 'Job Entity' sections are highlighted with green boxes. At the bottom, there are 'Cancel', 'Skip and Save', and 'Next' buttons.

6. Click on the **Next** button
7. You can select multiple job services by searching them by name in **Select Job Services**.
8. Click on the **Add Services** button.

New Job

Select Job Services

Infrastructure Improvement X

Add Services

Previous

Skip and Save

Next

9. The new job service will be displayed in the table. You can edit/delete the job service from the icons in the Action column.

New Job

Select Job Services

Services

Service	Required Staff Days	Primary?	On-site?	Chargeable?	Pre-paid?	Action
Infrastructure Improvement	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div><div></div><div></div></div>

Job Fees

Service	Billable Mandays	Service Fees	Action
Infrastructure Improvement	10	1,000	<div><div></div><div></div></div>

Transportation Fees

Service	Transportation Fees	Air Ticket	Hotel Fees	Other Fees	*Transportation Fees	*Air Ticket	*Hotel Fees	*Other Fees	Invoice TCs	Action
Infrastructure Improvement	100	100	100	100					<input checked="" type="checkbox"/>	<div><div></div><div></div></div>

* = This fee will be charged/invoiced

Previous

Skip and Save

Next



10. Click on the **Next** button
11. You can select multiple users whom you would like to assign to this job by searching them by name in **Select Stakeholders**.
12. Click on the **Add Stakeholders** button

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The screenshot shows the 'New Job' form. At the top, there is a search bar labeled 'Select Stakeholders' with a magnifying glass icon. Below it, a tag 'Platform Integration User' with an 'X' to remove it is visible. The 'Add Stakeholders' button is highlighted with a green box. At the bottom, there are 'Previous' and 'Save' buttons, and a progress indicator with three dots, the second of which is filled.

13. The new job stakeholder will be displayed in the table. You can edit/delete the job stakeholder from the icons in the Action column.

The screenshot shows the 'New Job' form with the 'Stakeholders' table populated. The table has columns: Role, User, Man Days, Report Writer, Service, Start Date, End Date, and Action. The 'Action' column is highlighted with a green box, showing edit and delete icons. The table contains one row for 'Field Staff'.

Role	User	Man Days	Report Writer	Service	Start Date	End Date	Action
Field Staff	Platform Integration User	10	<input type="checkbox"/>	Infrastructure Improvement	08-Jan-2022	31-Jan-2022	 

14. Click on the **Save** button.

- **Edit or Delete Jobs**

You can edit/delete jobs using the drop-down button **Edit** or **Delete** in the “Job Manager” tab.

Neilon Job Manage... Job Manager Invoice Manager Outstanding Invoices

Job Manager

Keyword
Search Records Show All Records

Jobs (70)

	Job#	Job Entity	Status	Job Start Date	Job End Date	Customer
▼	AUD-1334	Communications Unlimited Inc	Requested			Edge Communications
Edit	COD-88	Communications Unlimited Inc	Requested			Burlington Textiles Corp of America
Delete	COD-86	Communications Unlimited Inc	Requested			Burlington Textiles Corp of America
▼	AUD-COD-85	Communications Unlimited Inc	Requested	21-Dec-2021	30-Dec-2021	Burlington Textiles Corp of America
▼	AUD-COD-84	Communications Unlimited Inc	Requested			Burlington Textiles Corp of America

● Outstanding Invoices

You can see the list of Jobs and Services which are ready to invoice at the **Outstanding Invoices** tab.

Neilon Job Manage... Job Manager Invoice Manager Outstanding Invoices

Outstanding Invoices

Payee	Job#	Job Entity	Status	Job Start Date	Service	Job Fees	Travel Costs	Invoice TCs	Total	Invoiced(%)	Invoice Type
▼ Burlington Textiles Corp of America	AUD-COD-13	GenePoint	Requested	18-Nov-2021	Server Recovery	CNY 700	CNY 2800	<input checked="" type="checkbox"/>	CNY 3500	0 %	Prepaid
					Data Migration	CNY 8000	CNY 2000	<input checked="" type="checkbox"/>	CNY 10000	0 %	Prepaid
	AUD-COD-3	Burlington Textiles Corp of America	Requested	22-Aug-2021	Infrastructure Validation	USD 40	USD 120	<input checked="" type="checkbox"/>	USD 160	37.5 %	Prepaid
	AUD-COD-73	Communications Unlimited Inc	Confirmed	01-Nov-2021	Infrastructure Improvement	USD 1000	USD 0	<input type="checkbox"/>	USD 1000	0.5 %	EOM
▼ Communications Unlimited Inc	AUD-COD-85	Communications Unlimited Inc	Requested	21-Dec-2021	Code Cleanup	USD 1000	USD 400	<input checked="" type="checkbox"/>	USD 1400	0 %	Prepaid
	AUD-1-4	Burlington Textiles Corp of America	Requested	23-Aug-2021	Infrastructure Improvement	INR 100	INR 80	<input checked="" type="checkbox"/>	INR 180	75 %	Prepaid
					Infrastructure Validation	INR 500	INR 0	<input type="checkbox"/>	INR 500	0 %	Prepaid
	AUD-63	Communications Unlimited Inc	On hold	20-Nov-2021	Infrastructure Validation	USD 500	USD 0	<input type="checkbox"/>	USD 500	50 %	Prepaid
▼ Edge Communications	AUD-1334	Communications Unlimited Inc	Requested		Infrastructure Improvement	USD 1000	USD 400	<input checked="" type="checkbox"/>	USD 1400	0 %	Prepaid
	AUD-7	Burlington Textiles Corp of America	Proposed	09-Nov-2021	Infrastructure Validation	ANG 500	ANG 130	<input checked="" type="checkbox"/>	ANG 630	0 %	Prepaid

● Search Invoices

You can search and filter your existing invoices from the **Invoice Manager** tab

Click on **Add Filter** to set filter criteria for invoices.

The screenshot shows the 'Invoice Manager' section of the 'Neilon Job Management' application. A search bar at the top contains the text 'Search...'. Below it, a list of invoices is displayed with columns: Invoice#, Payee, Invoice Type, Payment Received, Payment Date, Currency, Invoice Recipient, and Total. A filter dropdown menu is open, showing the 'Issue Date' field with the operator 'greater or equal' and the value 'Dec 29, 2021'. The dropdown also includes a 'Done' button. The list of invoices includes entries for 'Communications Unlimited Inc' and 'Burlington Textiles Corp of America'.

After criteria is selected, click Done and **Apply Filter**

● Create New Invoice

Customers have to make payment for the services you are provided to them. There are two types of services. Prepaid and EOM. For prepaid services, invoices need to be sent when the job is confirmed. For EOM services, invoices need to be sent after the job is completed. Follow below steps to create new invoices.

1. Open App Launcher > Neilon Job Management
2. Open **Outstanding Invoices** tab.
3. Click the **Issue Invoice** button for the customer for whom you want to create the invoice

The screenshot shows the 'Outstanding Invoices' section of the 'Neilon Job Management' application. A list of invoices is displayed with columns: Payee, Job#, Job Entity, Status, Job Start Date, Service, Job Fees, Travel Costs, Invoice TCs, Total, Invoiced(%), and Invoice Type. An 'Issue Invoice' button is visible next to the first invoice entry for 'Communications Unlimited Inc'.

4. Add appropriate Invoice details like Invoice Number, Issue Date, Invoice Recipient, Vat %, Invoice By etc in the first step and click the **Next** button. If **Invoice By** list is empty, ask your System Admin to configure Company Bank Accounts in your org.

Issue Invoice

Details

Payee Burlington Textiles Corp of America	* Issue Date Apr 20, 2022
Invoice Number 45	VAT Percentage 10.00%
Invoice Recipient Jack Rogers	Invoice By Neilon Technologies LLP

Payee Detail

Contact Name Jack Rogers	Address 525 S. Lexington Ave
Postal Code 27215	Country USA
Province NC	City Burlington
Phone (336) 322-7000	Email(s)

Cancel
Skip and Save
Next

5. Click on the **Add** button and you can select the job services which need to be included in this invoice.

Issue Invoice

Invoice Line Items Add

No records found

Previous
Save

6. After selecting the service, Enable the **Invoice TCs** checkbox and provide fees that you want to invoice in this invoice.

Issue Invoice

Invoice Line Items

[Add](#)
⚙️

Job	Service	Invoice TCs	Service Fees	Transportation Fees	Hotel Fees	Air Ticket	Other Fees	Total Travel Costs	Payment Type
🗑️ AUD-1334	Infrastructure Improvement	Yes <input checked="" type="checkbox"/>	0 / 1000 USD <div style="border: 1px solid green; padding: 2px;">100.00</div>	0 / 100 USD <div style="border: 1px solid green; padding: 2px;">100.00</div>	0 / 100 USD <div style="border: 1px solid green; padding: 2px;">100.00</div>	0 / 100 USD <div style="border: 1px solid green; padding: 2px;">100.00</div>	0 / 100 USD <div style="border: 1px solid green; padding: 2px;">100.00</div>	400 USD	Prepaid

[Previous](#)[Save](#)

7. Click the **Save** button.

● Generate PDF for Invoice

You can generate a PDF for invoices. Follow below steps to create PDF for any invoice

1. Open **Invoice Manager**
2. Click action dropdown for the invoice record for which you want to generate PDF

Neilon Job Manage...
Neilon Jobs Administration
Job Manager
Invoice Manager
Outstanding Invoices

📄 Invoice Manager

✎

Search

Show

All Records

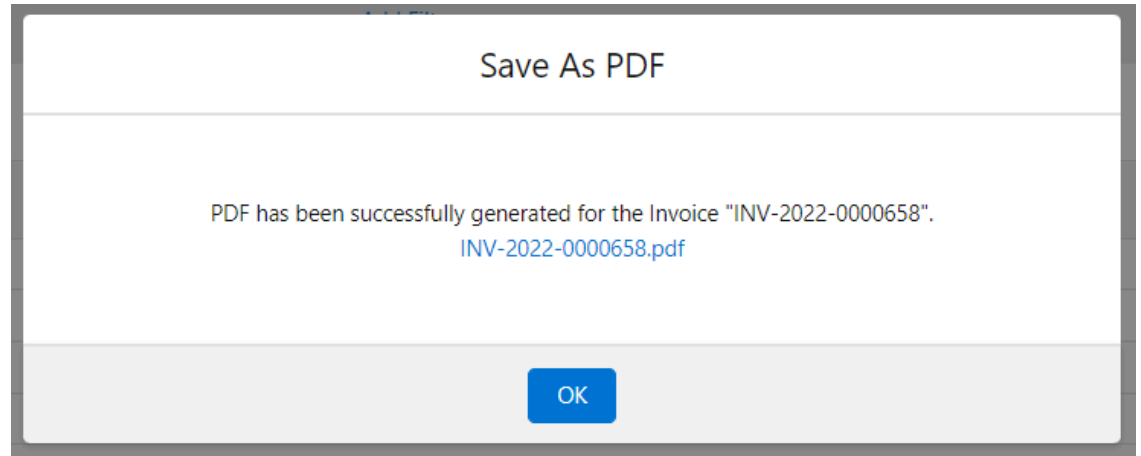
[Add Filter](#)
[Remove All](#)

Invoices (78)

[New Invoice](#)
⚙️

	Invoice#	Payee	Invoice Type	Issue Date	Payment Received	Payment Date	Currency	Invoice Recipient	Total
▼	INV-2022-0000771	Burlington Textiles Corp of America	Pre-paid	13-Jul-2022	<input type="checkbox"/>		CNY	Jack Rogers	CNY 495
▼	INV-2022-0000770	Burlington Textiles Corp of America	EOM	23-Jun-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 375
▼	INV-2022-0000768	Burlington Textiles Corp of America	Pre-paid	23-Jun-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 0
▼	INV-2022-0000694	Burlington Textiles Corp of America	Pre-paid	22-Jun-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 360
⋮	6	Burlington Textiles Corp of America	Pre-paid	31-May-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 1.18
⋮	5	Burlington Textiles Corp of America	Pre-paid	31-May-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 1
⋮	4	Burlington Textiles Corp of America	Pre-paid	31-May-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 25
⋮	3	Burlington Textiles Corp of America	Pre-paid	31-May-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 0
⋮	2	Communications Unlimited Inc	Pre-paid	17-May-2022	<input checked="" type="checkbox"/>	27-May-2022	USD	Abhay Sharma	USD 0

3. Click **Save as PDF**
4. It will generate PDF and attach to the invoice record. Click the link in the modal popup to view the PDF.



5. Open the invoice detail
6. Download the PDF in **Files** section

- **Change Payment Status of Invoices (Mark Invoice as Paid or Cancel the Payment)**

You can mark the invoice as paid once the payment is received for the invoice. Follow below steps to mark invoice as paid.

1. Open **Invoice Manager**
2. Click action dropdown for the invoice record which you want to Change Payment Status

Neilon Job Manage... Neilon Jobs Administration Job Manager **Invoice Manager** Outstanding Invoices



Invoice Manager


Keyword:

Invoices (78)

	Invoice#	Payee	Invoice Type	Issue Date	Payment Received	Payment Date	Currency	Invoice Recipient	Total
▼	INV-2022-0000771	Burlington Textiles Corp of America	Pre-paid	13-Jul-2022	<input type="checkbox"/>		CNY	Jack Rogers	CNY 495
▼	INV-2022-0000770	Burlington Textiles Corp of America	EOM	23-Jun-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 375
▼	INV-2022-0000768	Burlington Textiles Corp of America	Pre-paid	23-Jun-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 0
▼	INV-2022-0000694	Burlington Textiles Corp of America	Pre-paid	22-Jun-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 360
Edit	46	Burlington Textiles Corp of America	Pre-paid	31-May-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 1.18
Delete	45	Burlington Textiles Corp of America	Pre-paid	31-May-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 1
Change Payment Status	44	Burlington Textiles Corp of America	Pre-paid	31-May-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 25
Save as PDF	43	Burlington Textiles Corp of America	Pre-paid	31-May-2022	<input type="checkbox"/>		USD	Jack Rogers	USD 0
	42	Communications Unlimited Inc	Pre-paid	17-May-2022	<input checked="" type="checkbox"/>	27-May-2022	USD	Abhay Sharma	USD 0

3. Click **Change Payment Status**. Based on the payment status of the invoice it will open the popup. If invoice is not paid then it will open a popup to mark invoice as paid, If invoice is paid already then it will open a popup to cancel the payment.

Invoice Type	Issue Date	Received	Payment Date	Cur
<div><div></div><div>Mark as Paid Record a payment with mark invoice as paid.</div></div> <div><div>Payment Date</div><div><input type="text" value="13-Jul-2022"/></div></div> <div><div>Payment Reference</div><div><input type="text"/></div></div> <div><div>Save</div><div>Cancel</div></div>				

Invoice Type	Issue Date	Received	Payment Date	Cur
<div><div></div><div>Cancel Payment Cancel the invoice payment.</div></div> <div><div>Are you sure you want to cancel a payment?</div><div><div>Yes</div><div>No</div></div></div>				

4. Click **Save** in case of mark invoice as paid and click **Yes** in case of cancel the payment.