Neilon Project Management User Guide

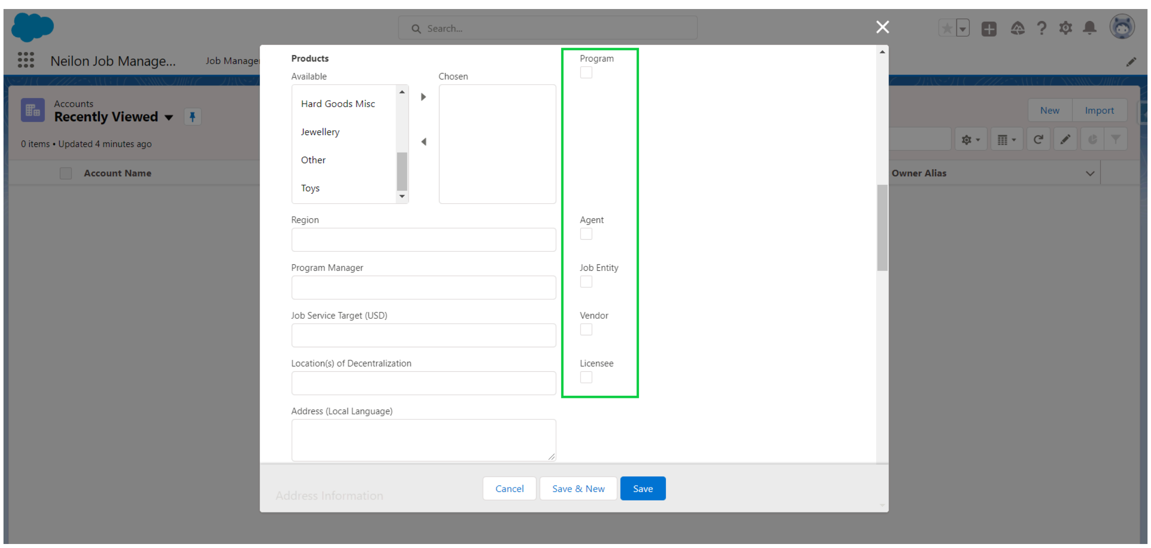
Introduction

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.

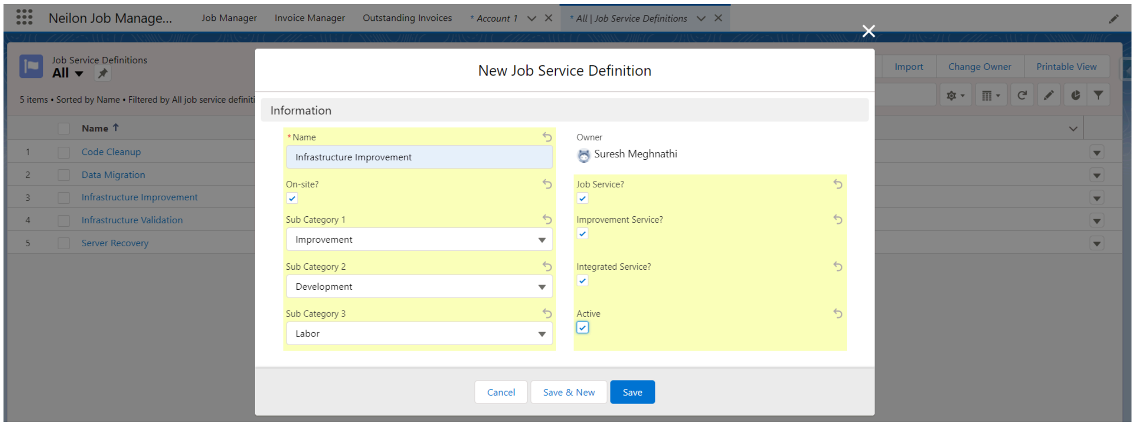


  4. Country cannot be empty for program or job entity accounts. Make sure you enter the **Billing Country** for those types of accounts.

- ### 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 typo of Service. Check On-Site? If the service needs to be performed on-site.

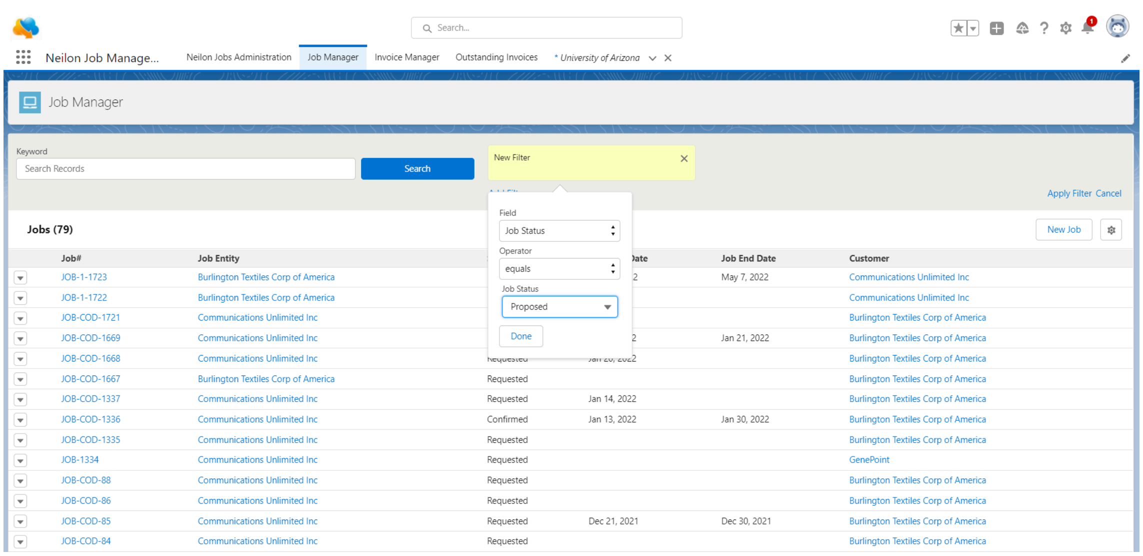


4. Click **Save**

- ## 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.

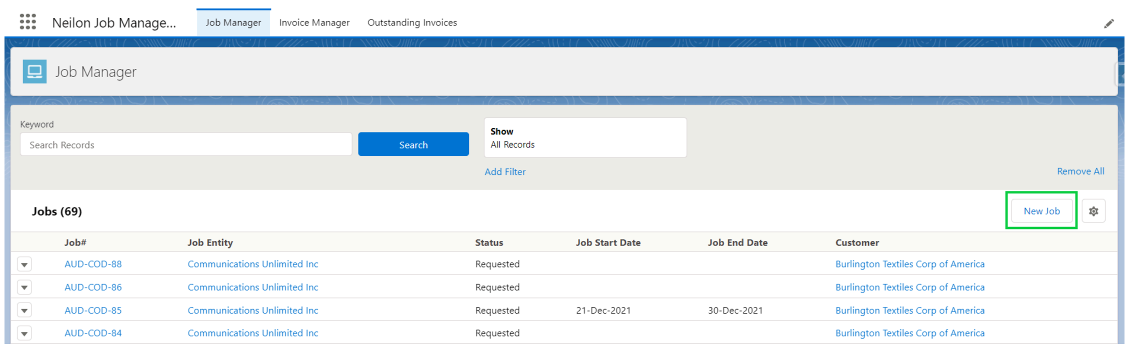


After criteria is selected, click Done and Apply Filter

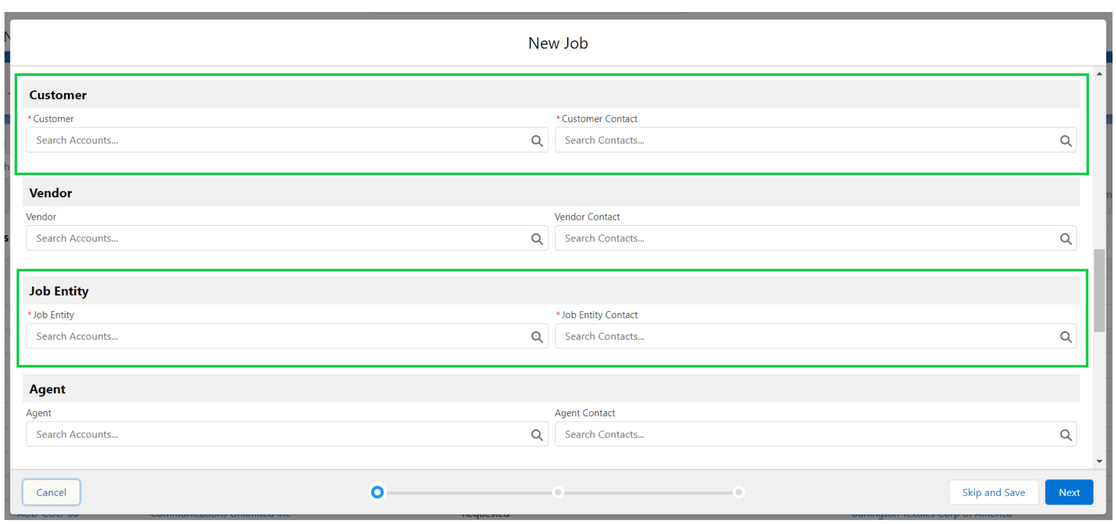
Create New Job

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.

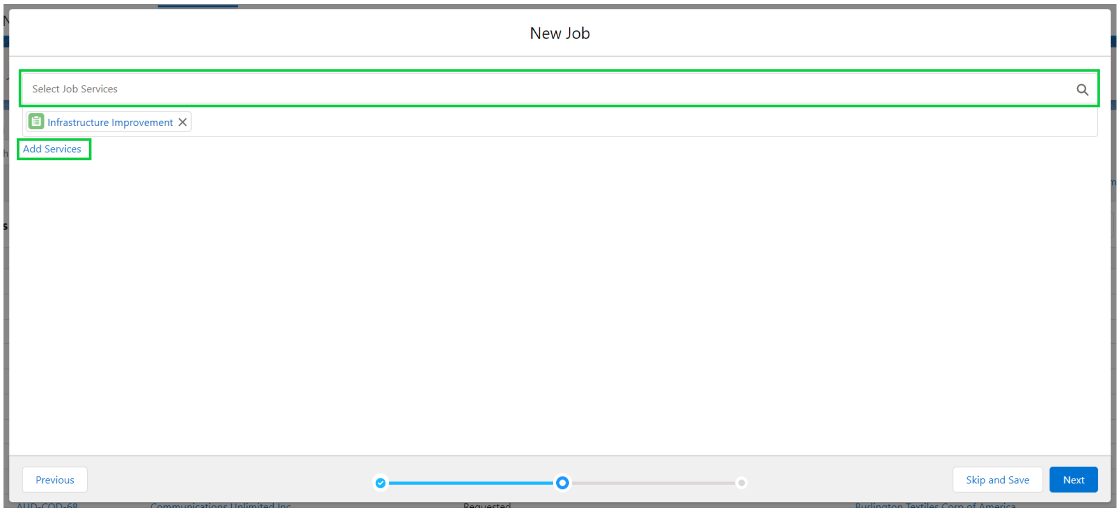
1. Open App Launcher > Neilon Job Management
2. Open **Job Manager** tab
3. Click the **New Job** button



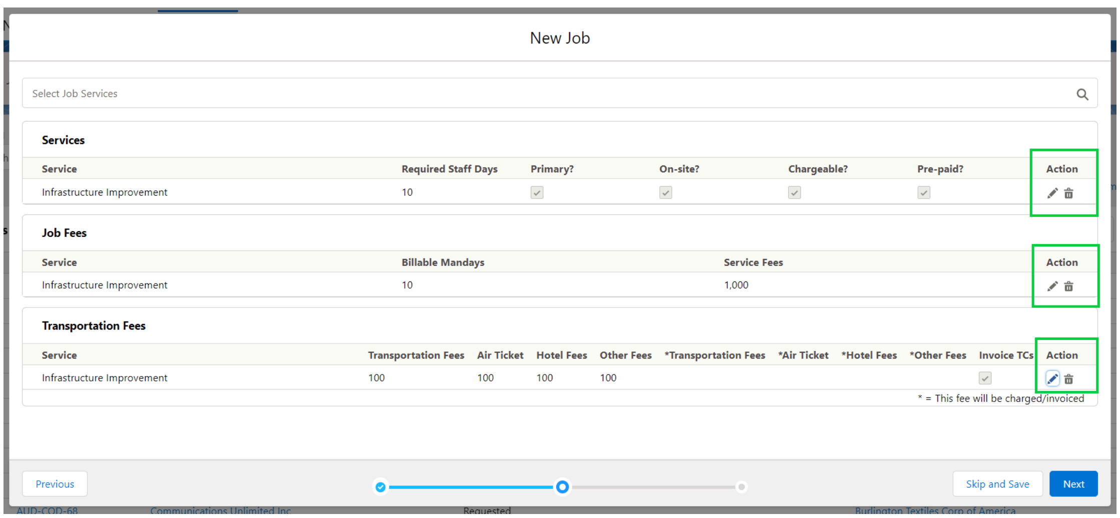
4. Add appropriate Job details like Job Number,Job Status, Job Start Date, Job End Date, Job Due Date etc.
5. Select a customer account as **Customer** and a job entity account as **Job Entity**. These two are required fields.



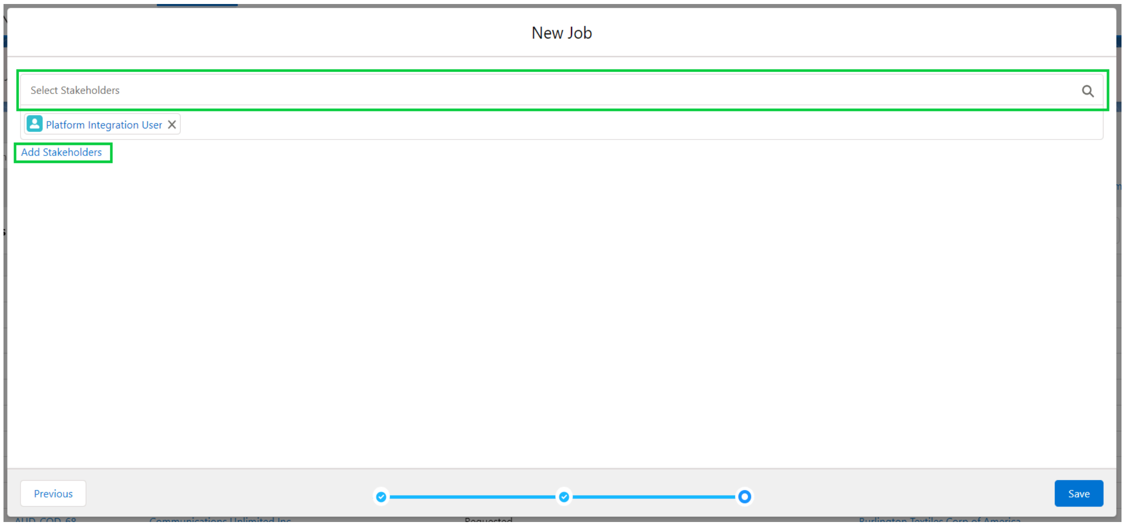
6. Click on the **Next** button
7. You can select multiple job services by searching them by name in **Select Job Services**.
8. Click on the **Add Services** button.



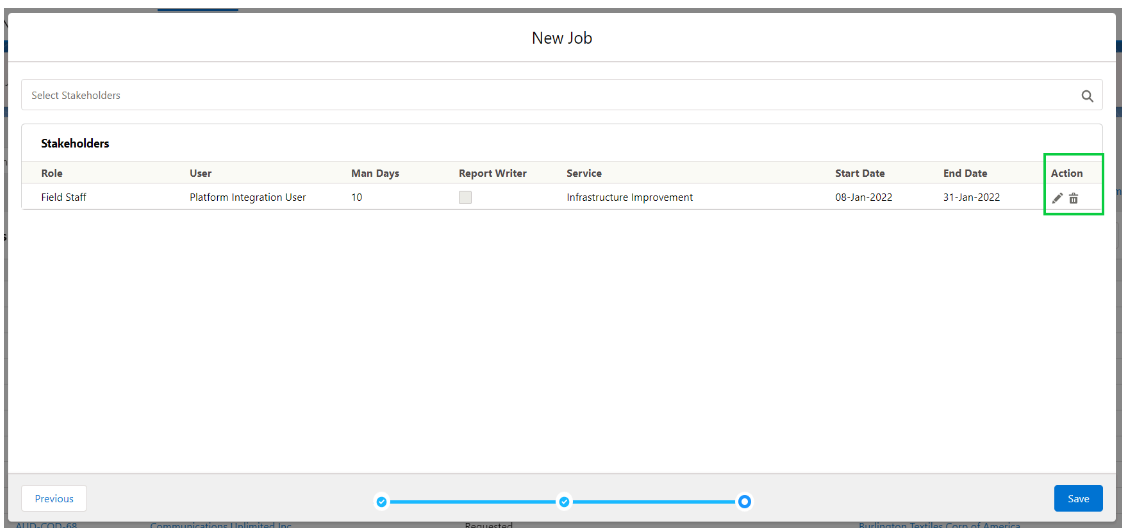
9. The new job service will be displayed in the table. You can edit/delete the job service from the icons in the Action column.



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



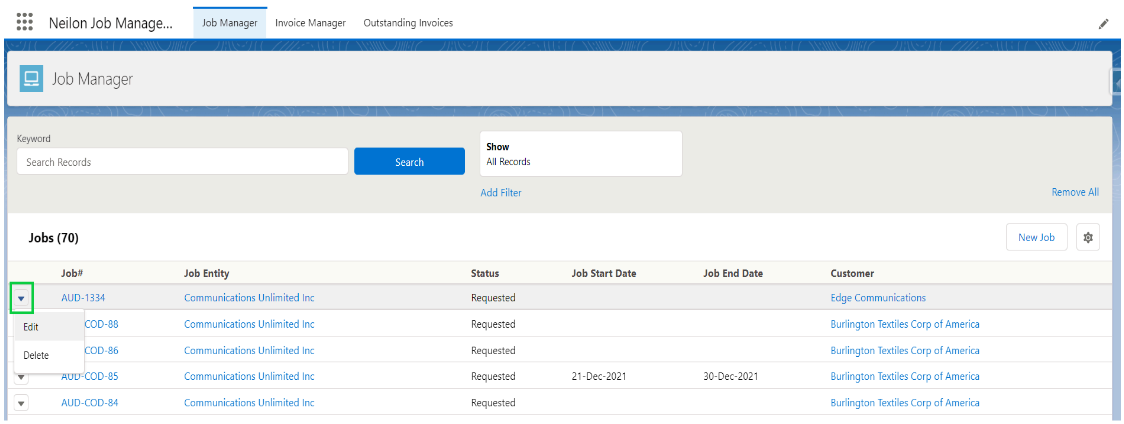
13. The new job stakeholder will be displayed in the table. You can edit/delete the job stakeholder from the icons in the Action column.



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

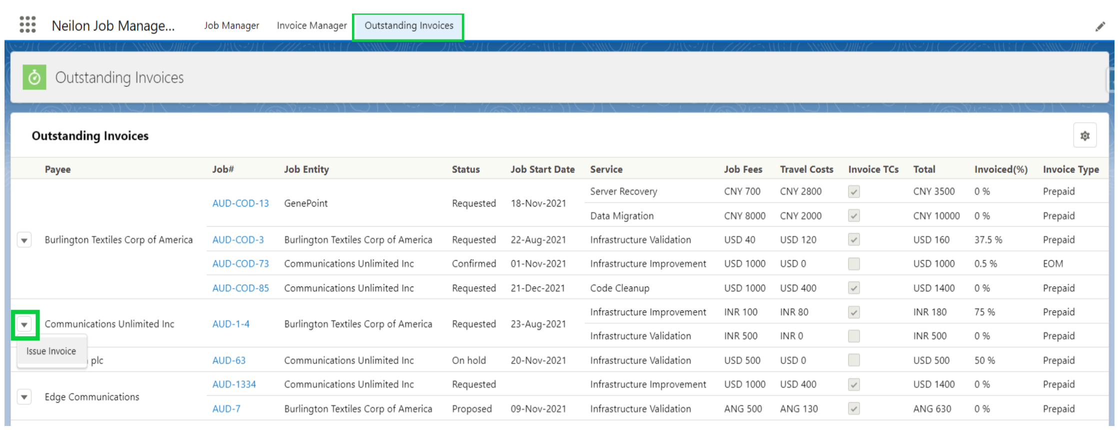
- ## Edit or Delete Jobs

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



- ## Outstanding Invoices

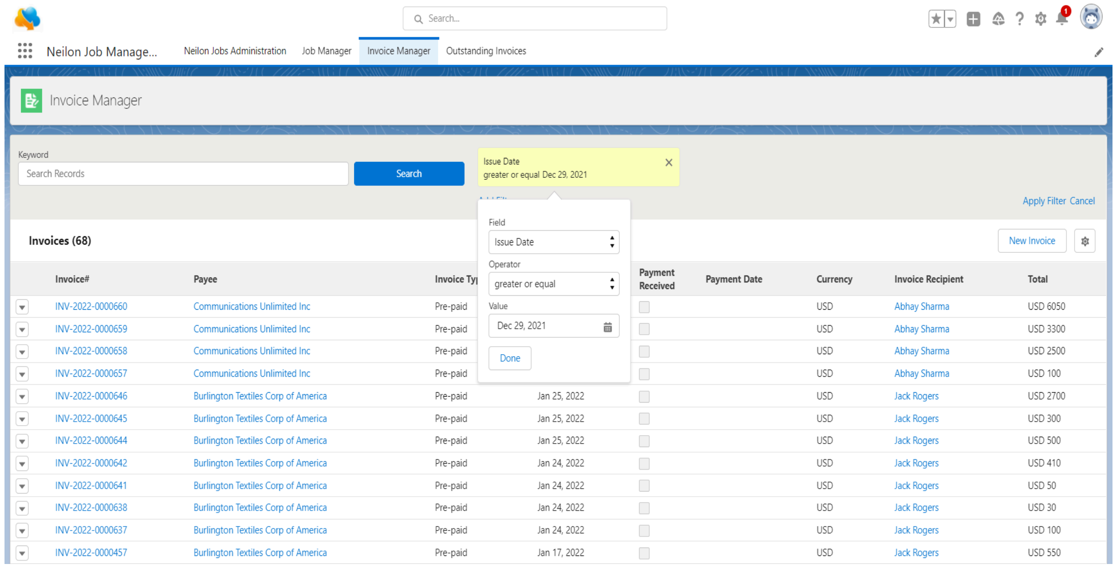
  You can see the list of Jobs and Services which are ready to invoice at the **Outstanding Invoices** tab.



- ## 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.

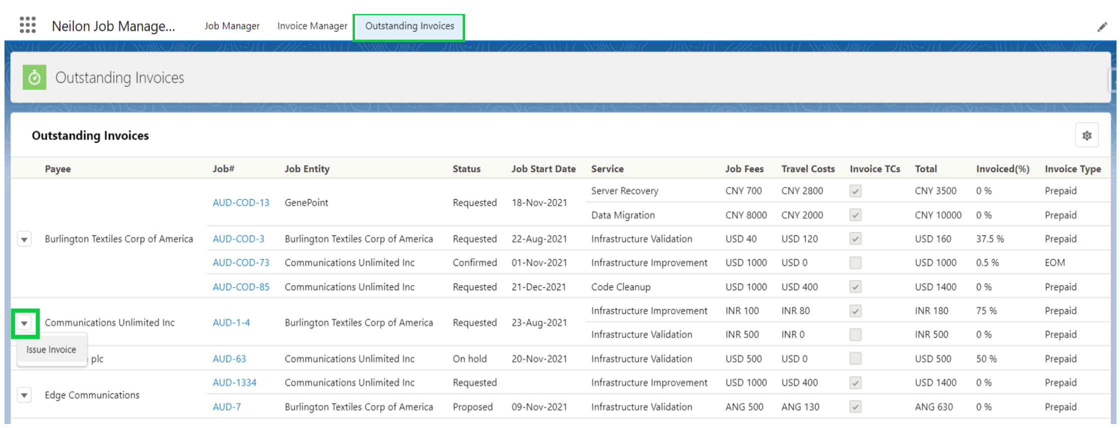


After criteria is selected, click Done and **Apply Filter**

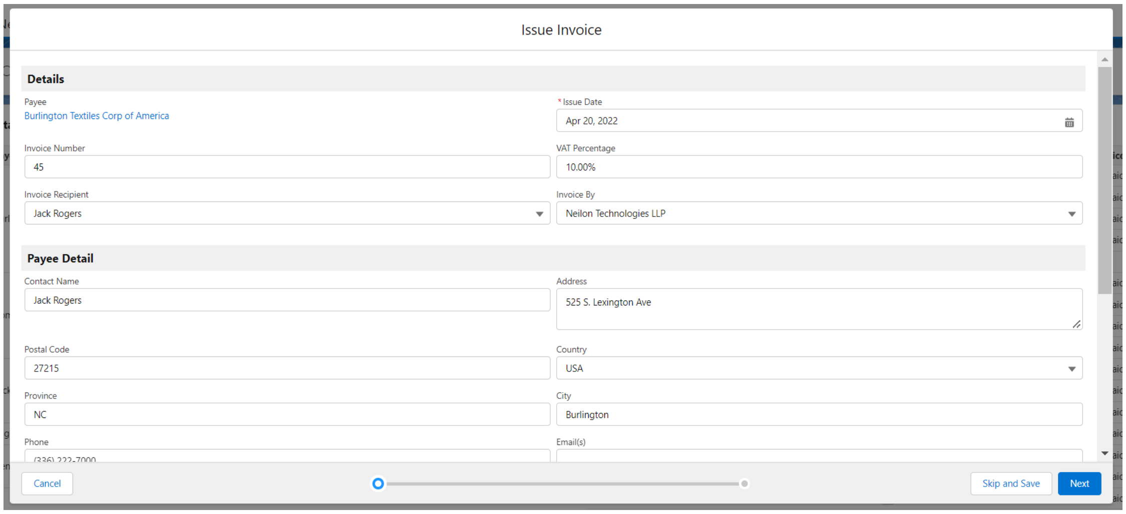
- ## Create New Invoice

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.

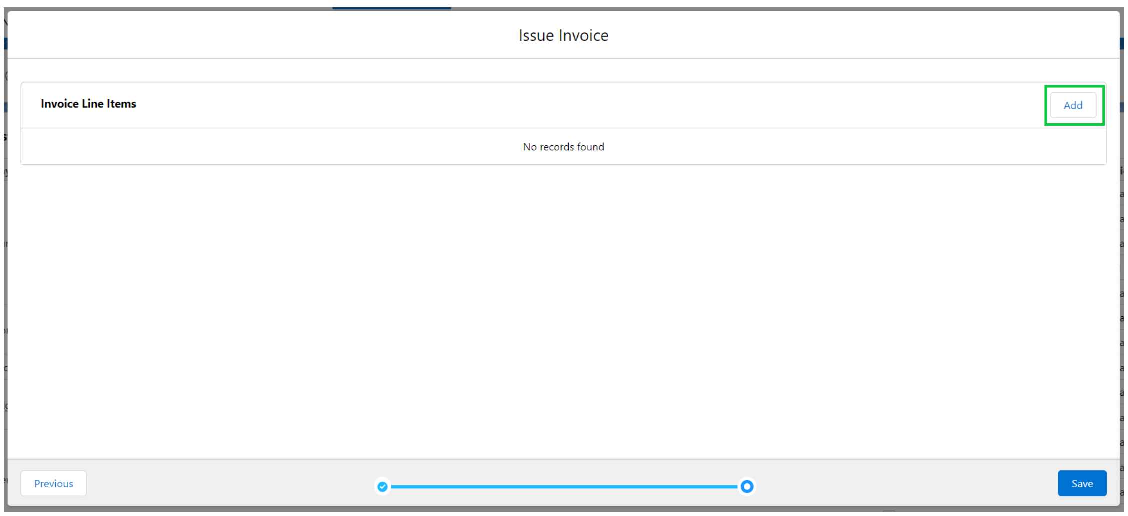
1. Open App Launcher > Neilon Job Management
2. Open **Outstanding Invoices** tab.
3. Click the **Issue Invoice** button for the customer for whom you want to create the invoice



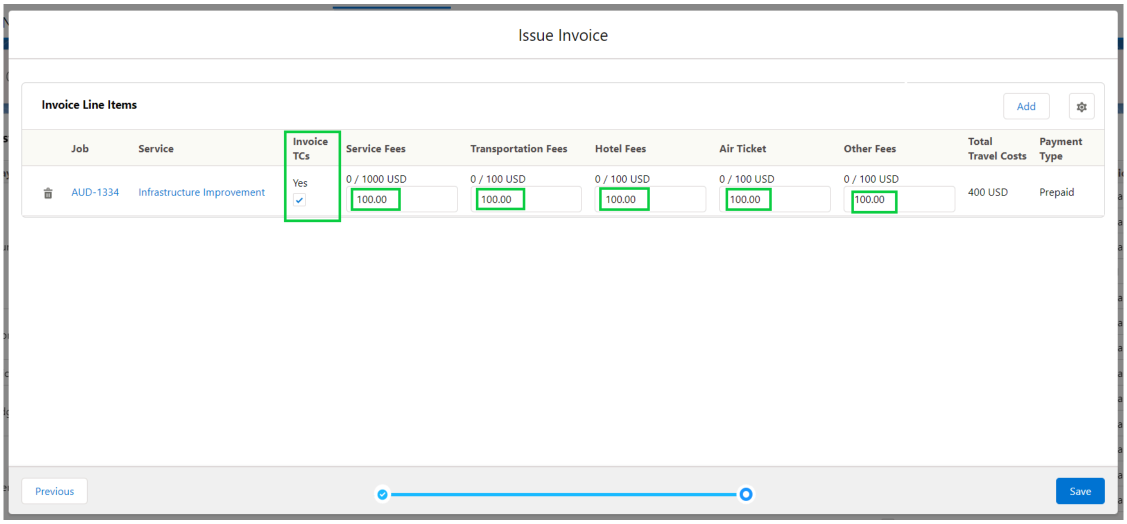
4. Add appropriate Invoice details like Invoice Number, Issue Date, Invoice Recipient, Vat %, Invoice By etc in the first step and click the **Next** button. If **Invoice By** list is empty, ask your System Admin to configure Company Bank Accounts in your org.



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



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

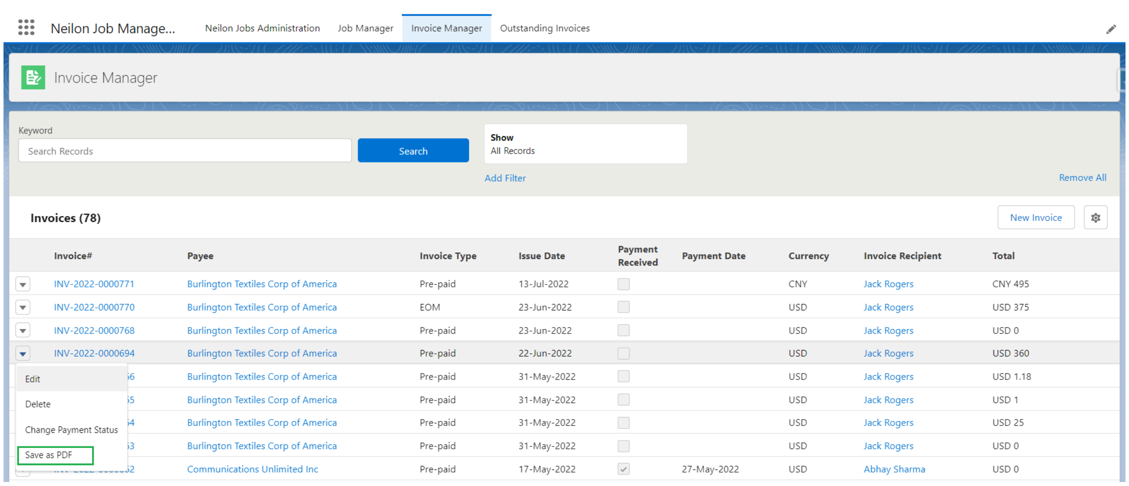


7. Click the **Save** button.

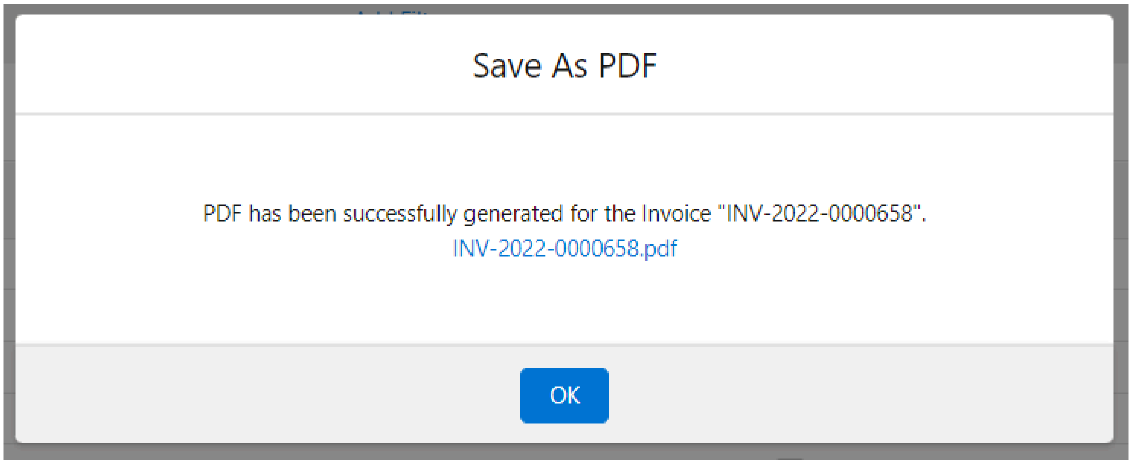
Generate PDF for Invoice

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



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.

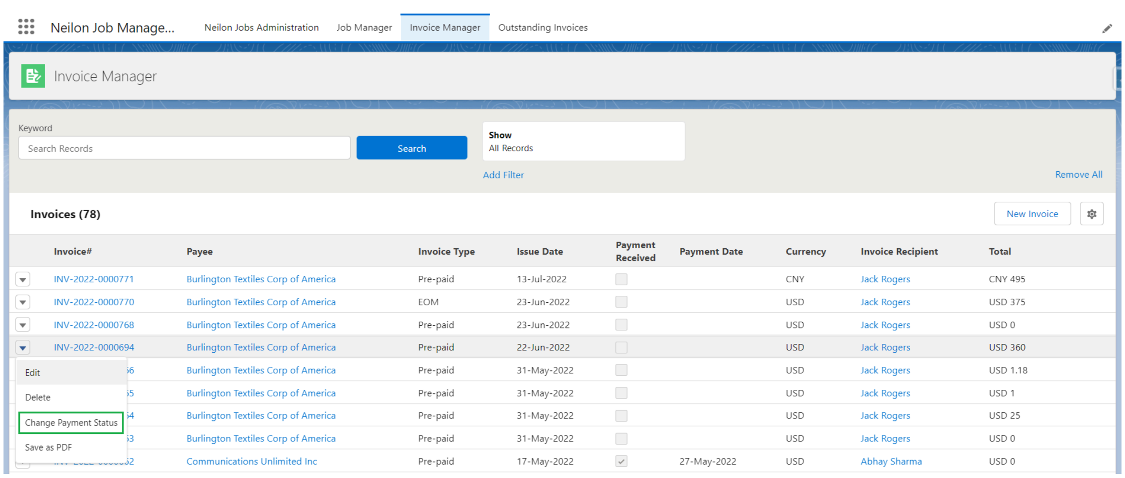


5. Open the invoice detail
6. Download the PDF in **Files** section

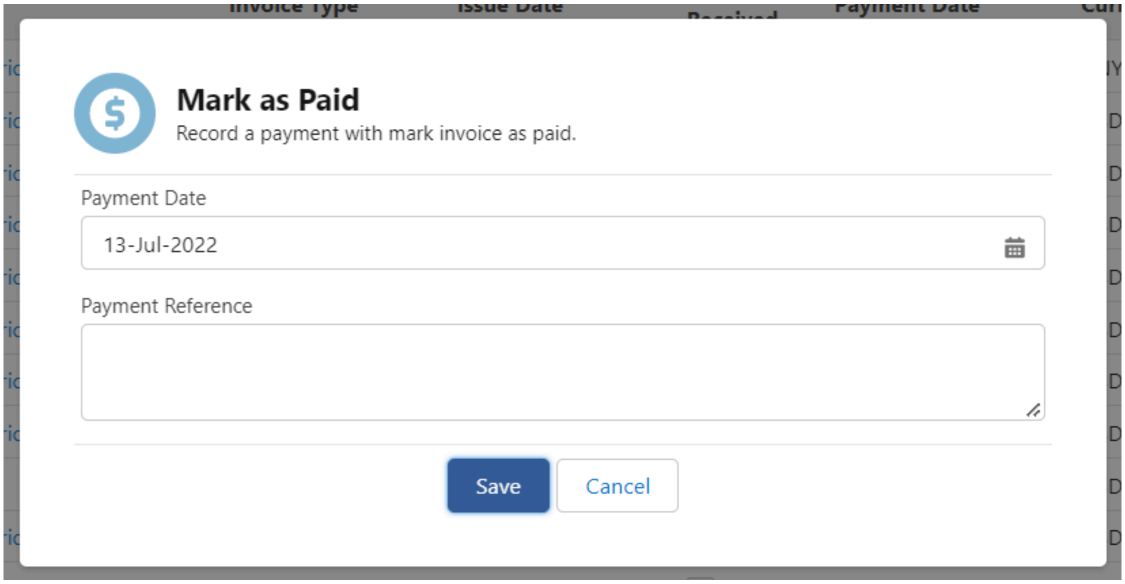
- ## Change Payment Status of Invoices (Mark Invoice as Paid or Cancel the Payment)

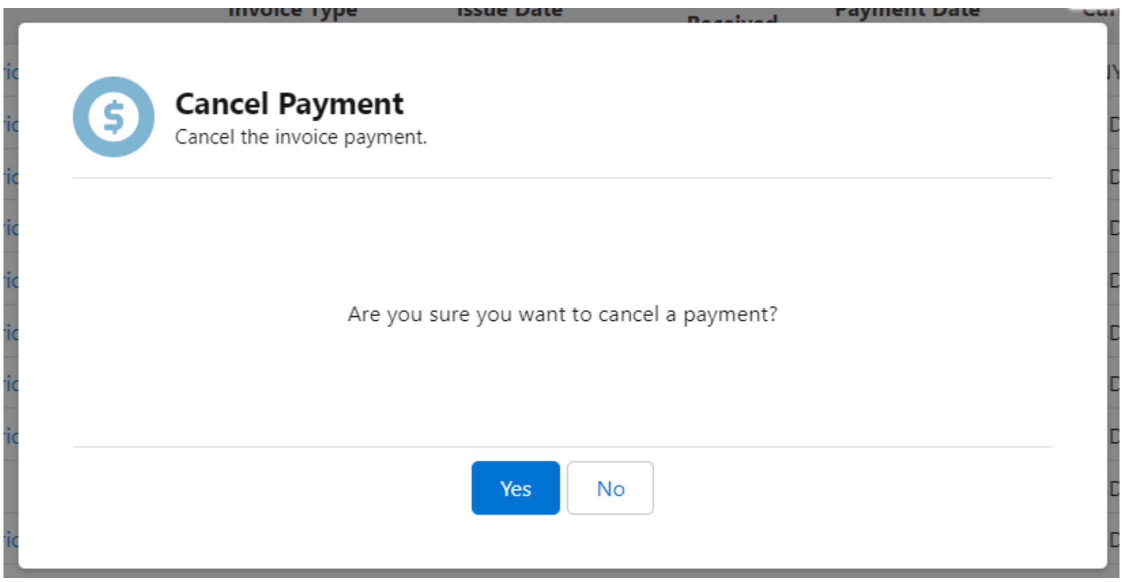
You can mark the invoice as paid once the payment is received for the invoice. Follow below steps to mark invoice as paid.

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



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.





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