



KYNECTION
KNOWLEDGE IN MOTION

MODULE OVERVIEW

KYNECTION · INVENTORY · INVENTORY MOBILE

Manage Your Inventory *From Your Phone*

The module overview for Inventory on the phone. Warehouses and stock levels, barcode-driven stocktakes counted on the floor, stock transfers between locations, and packing slips raised where the stock is.

4 CHAPTERS

3 MIN 45 SEC

INVENTORY

MOBILE USERS · STORES & DRIVERS

MODULE OVERVIEW · 3 MIN 45 SEC

What this module overview covers

Four stages cover the mobile app end to end. Chapter 1 is warehouses and stock. Chapter 2 is the stocktake, which is most of the video. Chapters 3 and 4 are transfers and packing slips.

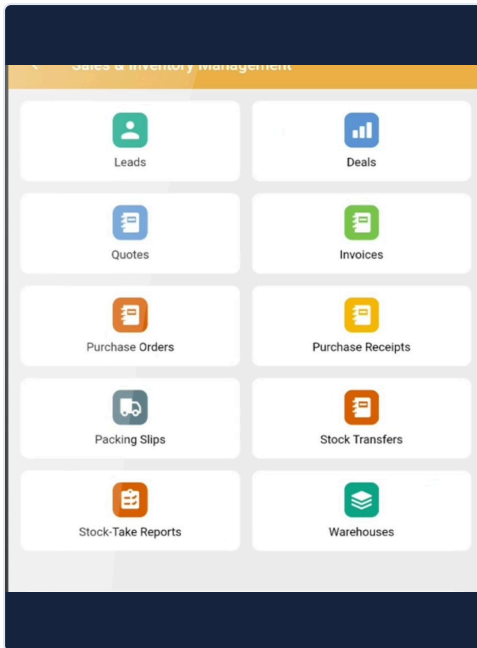
CH 01	Warehouses and stock Inventory sits alongside the sales functions on the mobile dashboard.	00:00–00:38
CH 02	Run a stocktake The longest part of the module: counting stock on the floor with a scanner.	00:38–02:08
CH 03	Transfer stock Moving quantities between warehouses from the phone.	02:08–03:02
CH 04	Packing slips What leaves the warehouse, raised where the picking happens.	03:02–03:45

- **Scanning is the point.** Location, barcode and lot or serial can each be scanned rather than typed, which is what makes a floor count fast and accurate.
- **A count in progress cannot be submitted.** The report will say so until every open line is confirmed, so a half-finished stocktake cannot be posted by accident.
- **A packing slip needs a warehouse.** Without an origin warehouse selected the slip cannot be confirmed.

READ AS Screens are captured from the walkthrough video at the timestamp shown on each step. Product names, counts and dates are demonstration data.

Warehouses and stock

Inventory sits alongside the sales functions on the mobile dashboard.

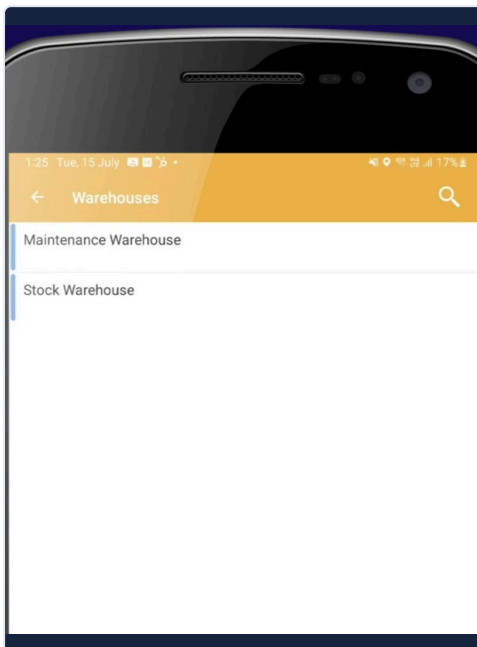


STEP 1 • 00:10 IN THE VIDEO

Open the inventory area

The mobile dashboard carries leads, deals, quotes, invoices, purchase orders, purchase receipts, packing slips, stock transfers, stock-take reports and warehouses.

CHAPTER 01 • STEP 1 OF 2



STEP 2 • 00:26 IN THE VIDEO

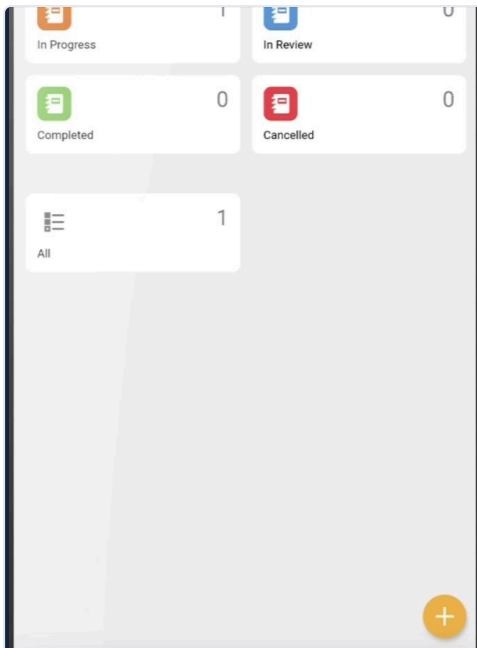
Read the warehouses

Warehouses list on the phone, here a maintenance warehouse and a stock warehouse, each opening to the stock held in it.

CHAPTER 01 • STEP 2 OF 2

Run a stocktake

The longest part of the module: counting stock on the floor with a scanner.

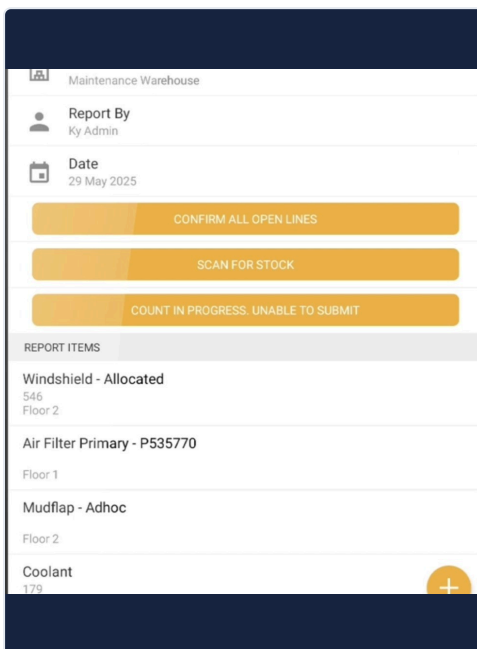


STEP 1 • 00:50 IN THE VIDEO

Read the stock-take reports

Reports group by status: in progress, in review, completed and cancelled, with the full list beneath.

CHAPTER 02 • STEP 1 OF 4



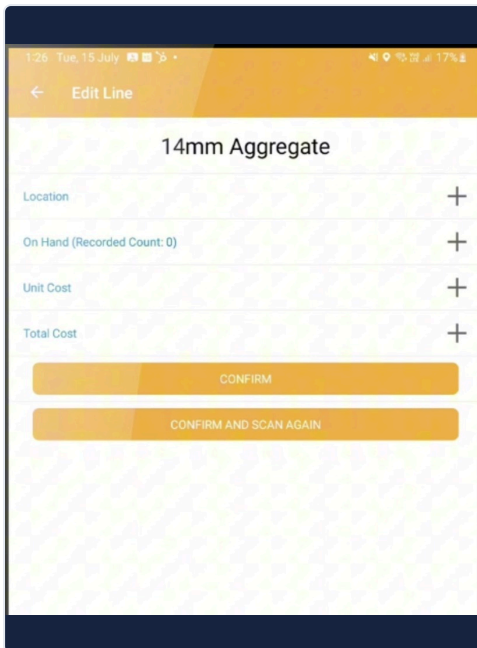
STEP 2 • 01:15 IN THE VIDEO

Open the report

The report shows who it was raised by and its date, with **Confirm All Open Lines, Scan For Stock** and the report items listed by product and floor.

CHAPTER 02 • STEP 2 OF 4

Run a stocktake

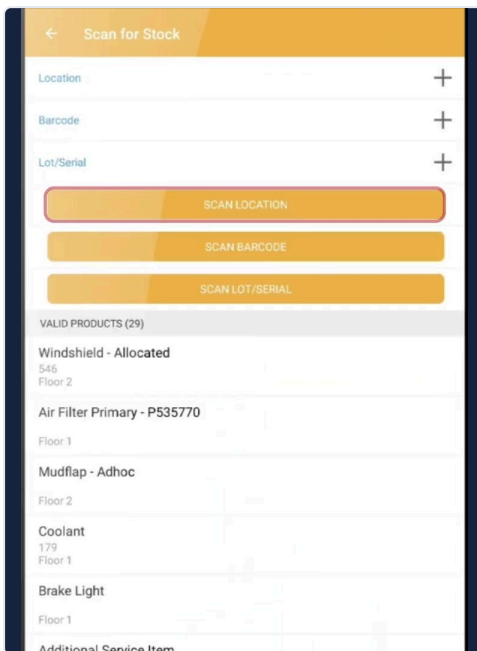


STEP 3 • 01:40 IN THE VIDEO

Edit a line

A line takes its location, on-hand recorded count, unit cost and total cost. **Confirm** saves it, or **Confirm and Scan Again** moves straight to the next item.

CHAPTER 02 • STEP 3 OF 4



STEP 4 • 01:58 IN THE VIDEO

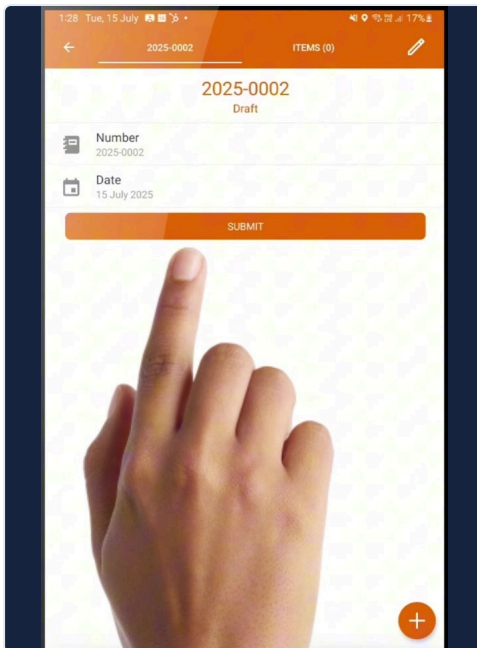
Scan for stock

Location, barcode and lot or serial can each be scanned. Valid products for the count list beneath with their floor.

CHAPTER 02 • STEP 4 OF 4

Transfer stock

Moving quantities between warehouses from the phone.

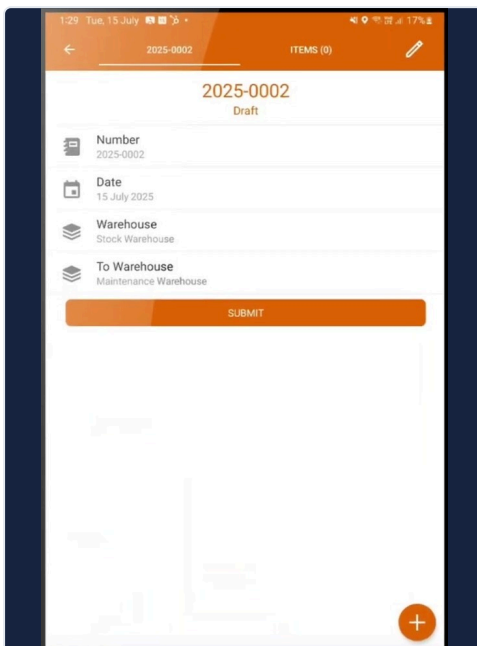


STEP 1 • 02:20 IN THE VIDEO

Start the transfer

A new transfer opens as a draft with its number and date, ready to submit.

CHAPTER 03 • STEP 1 OF 3



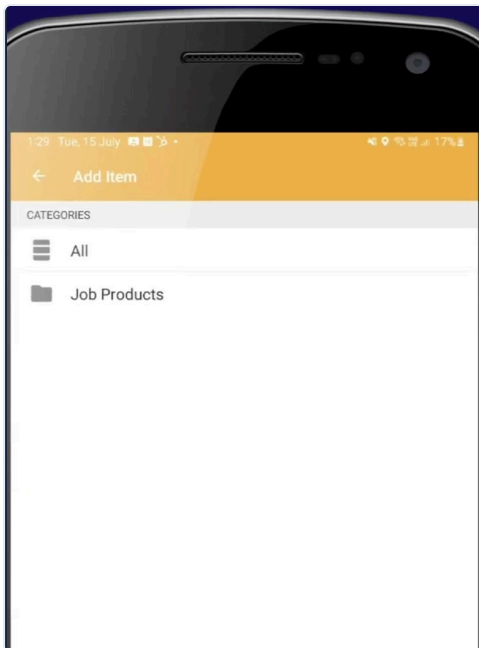
STEP 2 • 02:38 IN THE VIDEO

Set the warehouses

The transfer takes the origin warehouse and the destination, here moving from the stock warehouse to the maintenance warehouse.

CHAPTER 03 • STEP 2 OF 3

Transfer stock



STEP 3 • 02:47 IN THE VIDEO

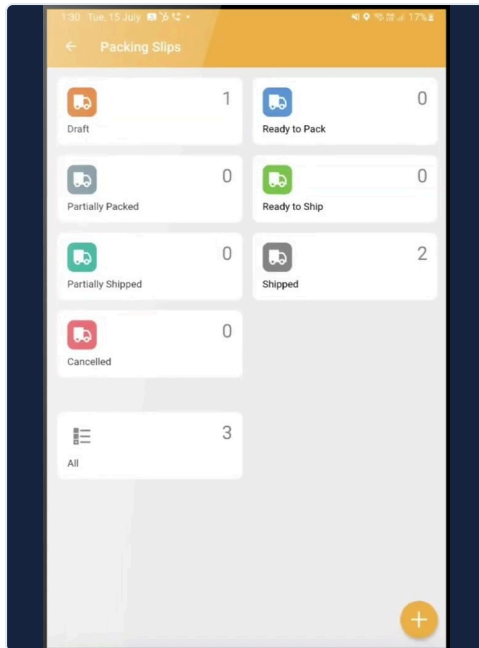
Add the items

Items are added from the catalogue, either from all products or from a category such as job products.

CHAPTER 03 • STEP 3 OF 3

Packing slips

What leaves the warehouse, raised where the picking happens.

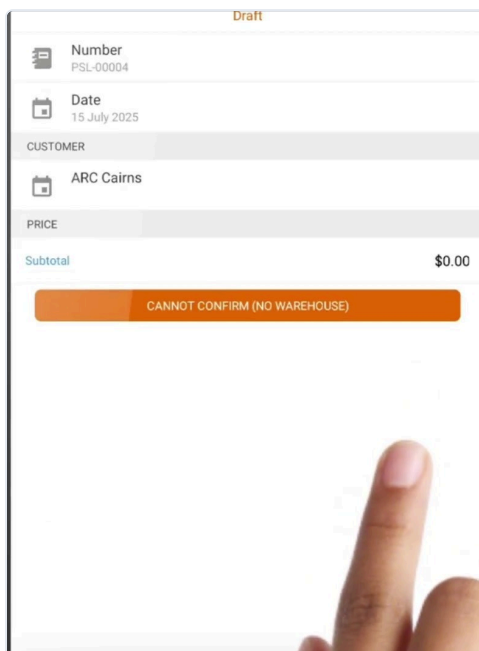


STEP 1 • 03:19 IN THE VIDEO

Read the packing slip dashboard

Slips group by their stage in the lifecycle: draft, ready to pack, partially packed, ready to ship, partially shipped, shipped and cancelled.

CHAPTER 04 • STEP 1 OF 2



STEP 2 • 03:32 IN THE VIDEO

Complete the slip

A slip takes its number, date, customer and price. It cannot be confirmed until an origin warehouse is set, which is what the button tells you.

CHAPTER 04 • STEP 2 OF 2