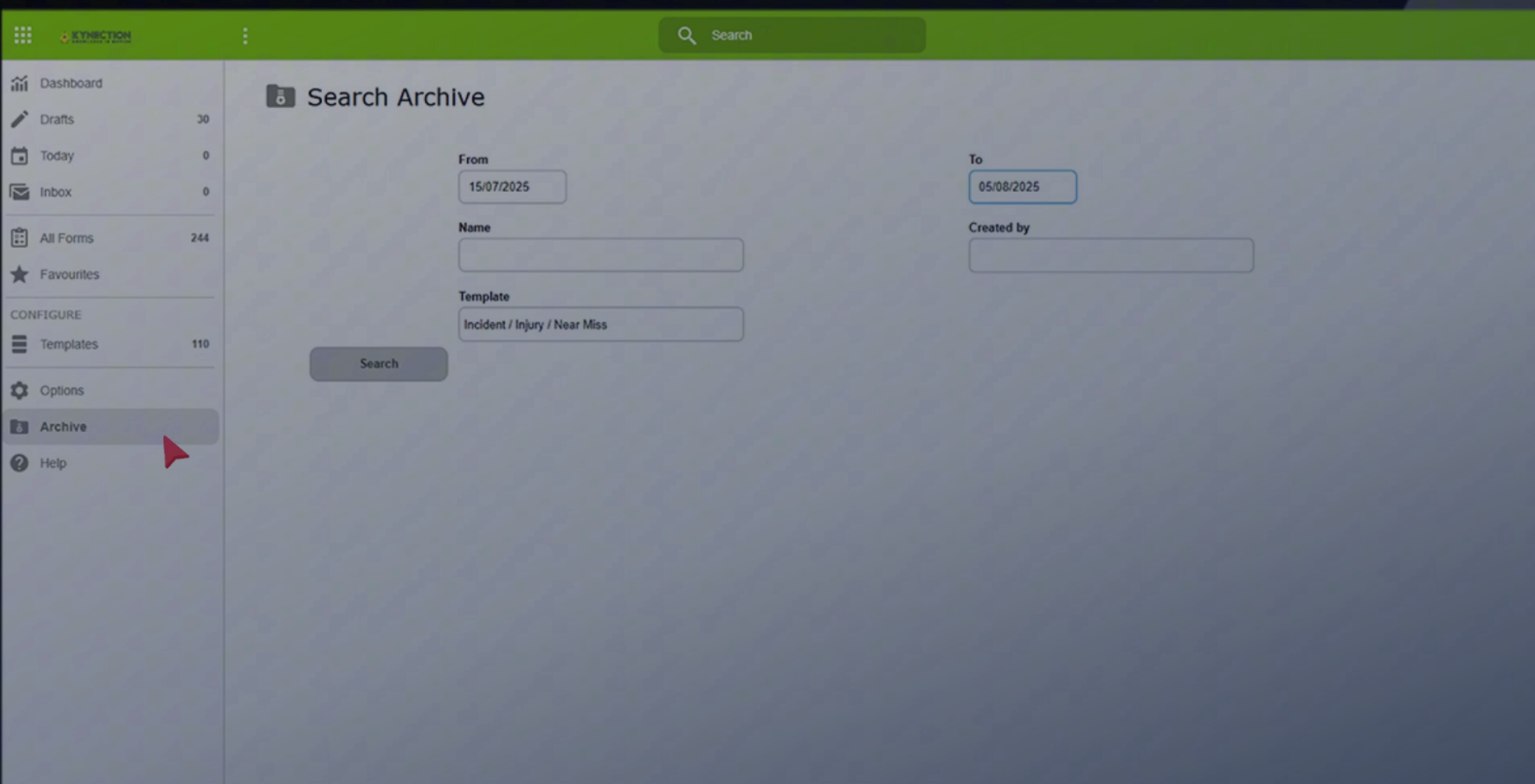




MODULE OVERVIEW

KYNECTION • KIM WELCOME • MANAGER TRAINING

Use Kynnection as a *Manager User*

The onboarding overview for a manager user. Access levels and what each can do, the dashboard and navigation, working with contacts and forms, exporting and importing data safely, and getting help when an import goes wrong.

6 CHAPTERS

6 MIN 43 SEC

KIM WELCOME

WEB USERS • MANAGERS

What this module overview covers

Six stages take a new manager from first login to self-sufficiency. Chapters 1 and 2 are access and navigation. Chapters 3 and 4 are contacts and forms. Chapters 5 and 6 are data handling and support.

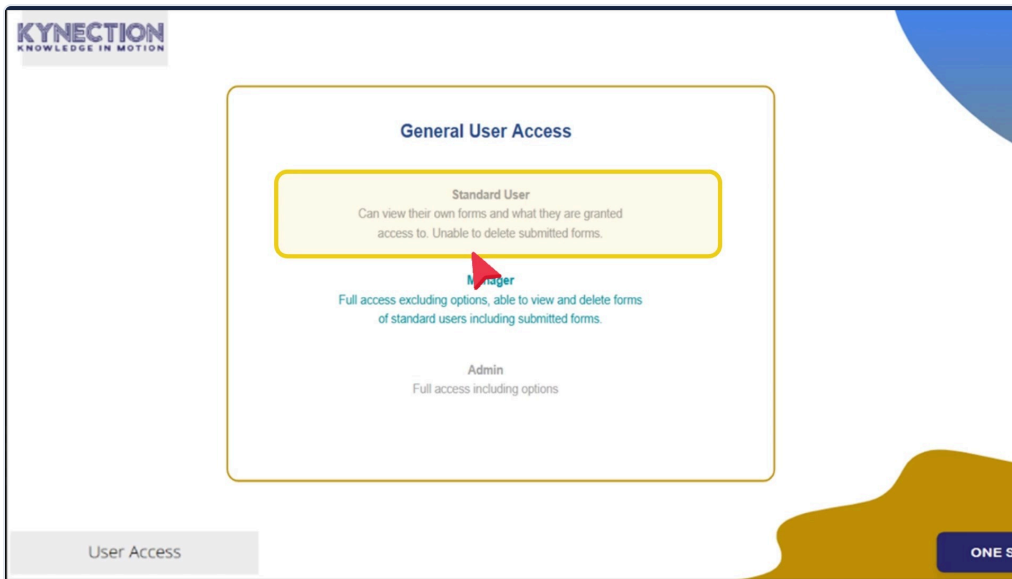
CH 01	Access levels What Standard, Manager and Admin each unlock.	00:00–00:39
CH 02	Dashboard and navigation Favourites and the toolbar are how a manager moves quickly.	00:39–01:20
CH 03	Contacts and filters Contacts is the largest record set most managers touch.	01:20–02:22
CH 04	Forms, archive and duplicates Finding submitted forms, and spotting records that should be one.	02:22–03:40
CH 05	Exporting and importing The part where care matters most.	03:40–05:03
CH 06	Errors and support What to do when an import fails, and how to reach Kynection.	05:03–06:42

- **Never change the ID column.** On an import, the ID column is what matches a row to an existing record. Change it and you create duplicates instead of updates.
- **Test with a small sample first.** Import a handful of rows, confirm they landed correctly, then run the full file.
- **Three access levels.** Standard, Manager and Admin see different things. Knowing which you hold explains most of what you can and cannot do.

READ AS Screens are captured from the walkthrough video at the timestamp shown on each step. Company names, policy numbers and dollar values are demonstration data.

Access levels

What Standard, Manager and Admin each unlock.

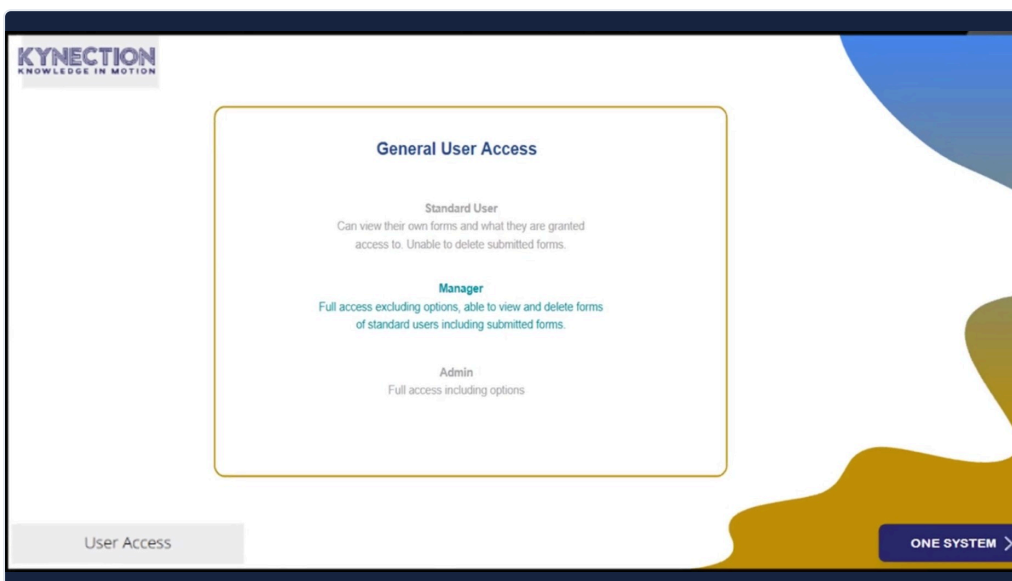


STEP 1 • 00:15 IN THE VIDEO

Understand the levels

Standard, Manager and Admin access levels each expose different modules and permissions.

CHAPTER 01 • STEP 1 OF 2



STEP 2 • 00:27 IN THE VIDEO

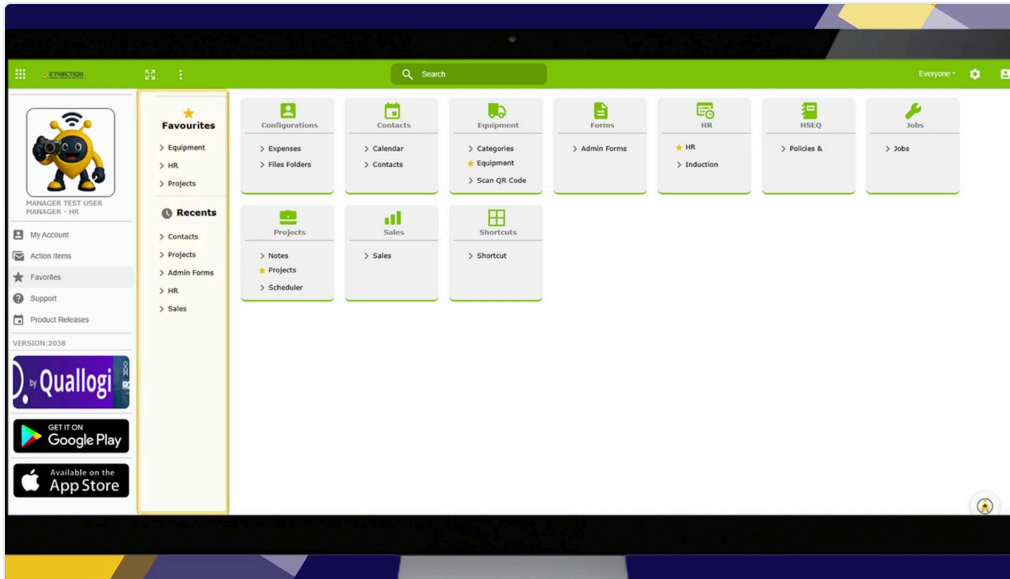
Know your level

Which level you hold explains most of what you can and cannot see, so check it before assuming something is missing.

CHAPTER 01 • STEP 2 OF 2

Dashboard and navigation

Favourites and the toolbar are how a manager moves quickly.

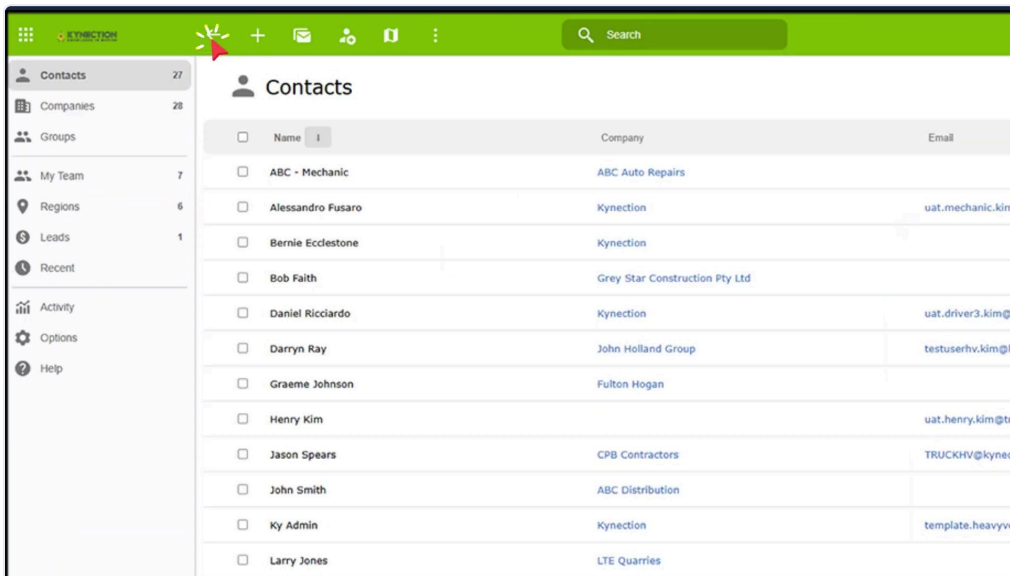


STEP 1 • 00:58 IN THE VIDEO

Read the manager dashboard

The dashboard carries your modules with favourites and recents for the ones you use most.

CHAPTER 02 • STEP 1 OF 2



STEP 2 • 01:19 IN THE VIDEO

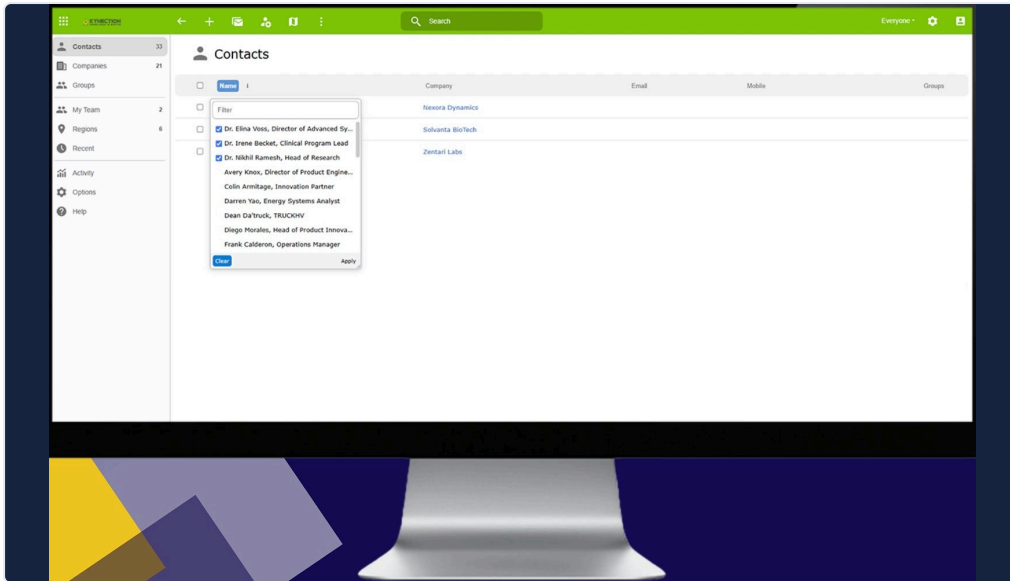
Use the common toolbar

The toolbar options repeat across modules, so the same actions sit in the same place wherever you are.

CHAPTER 02 • STEP 2 OF 2

Contacts and filters

Contacts is the largest record set most managers touch.



STEP 1 • 01:50 IN THE VIDEO

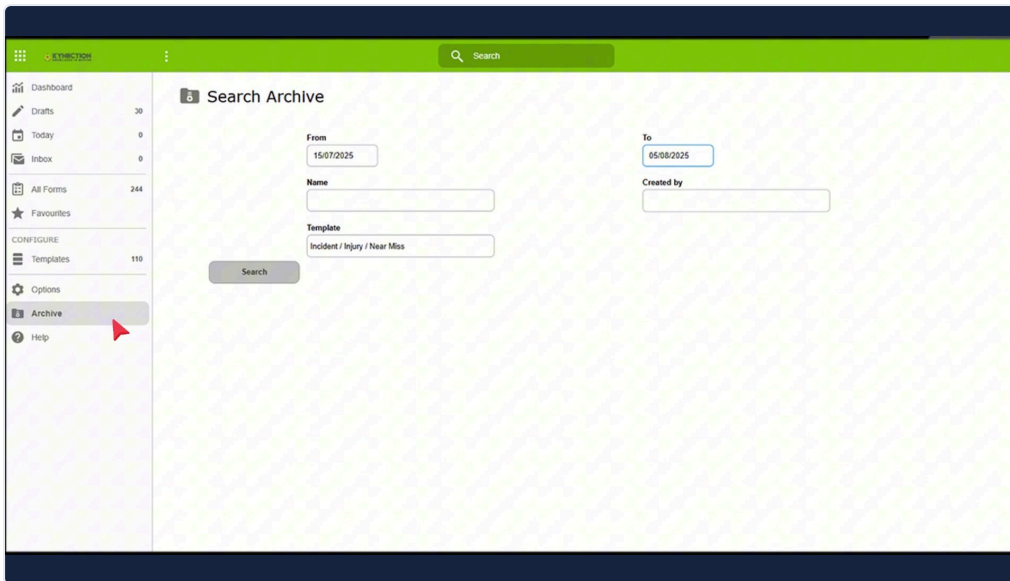
Open and filter contacts

Contacts opens with filters that narrow a large list by the fields that matter to you.

CHAPTER 03 • STEP 1 OF 1

Forms, archive and duplicates

Finding submitted forms, and spotting records that should be one.

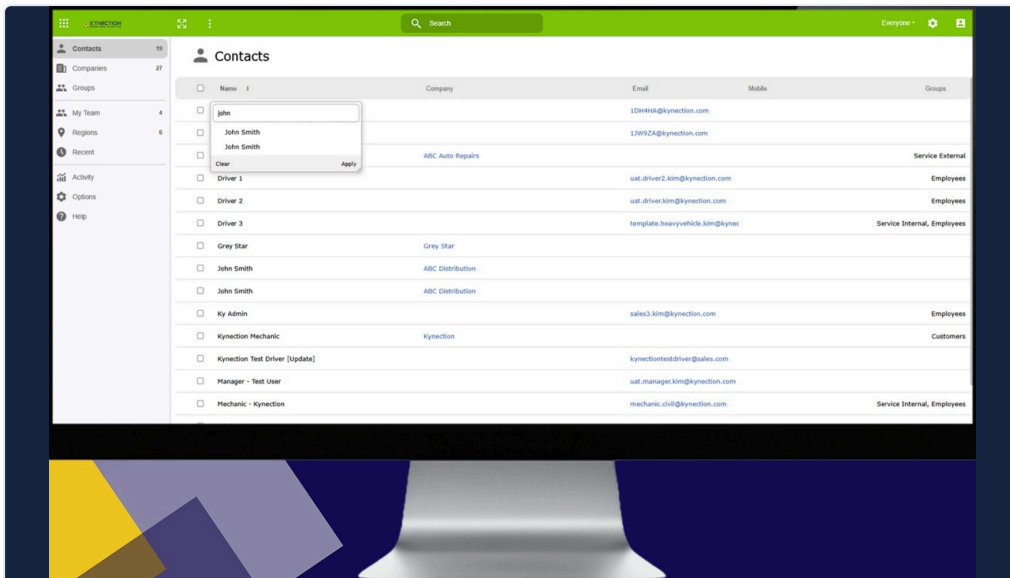


STEP 1 • 02:40 IN THE VIDEO

Search all forms

All Forms carries status filters and an archive, with search across both.

CHAPTER 04 • STEP 1 OF 4



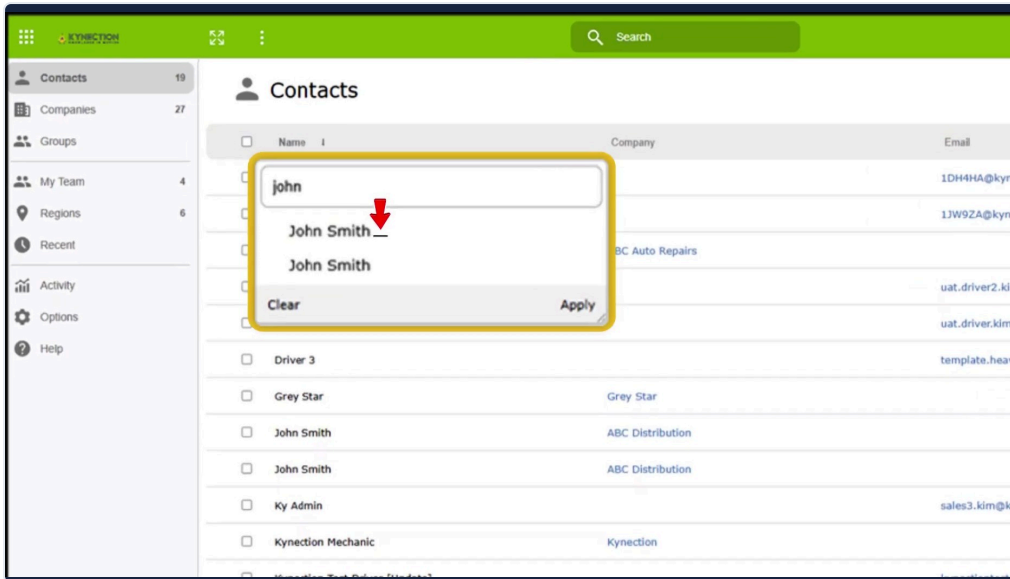
STEP 2 • 03:05 IN THE VIDEO

Open contacts from the archive

Contacts and forms share the same navigation, so you move between the record set and the archive without leaving the module.

CHAPTER 04 • STEP 2 OF 4

Forms, archive and duplicates

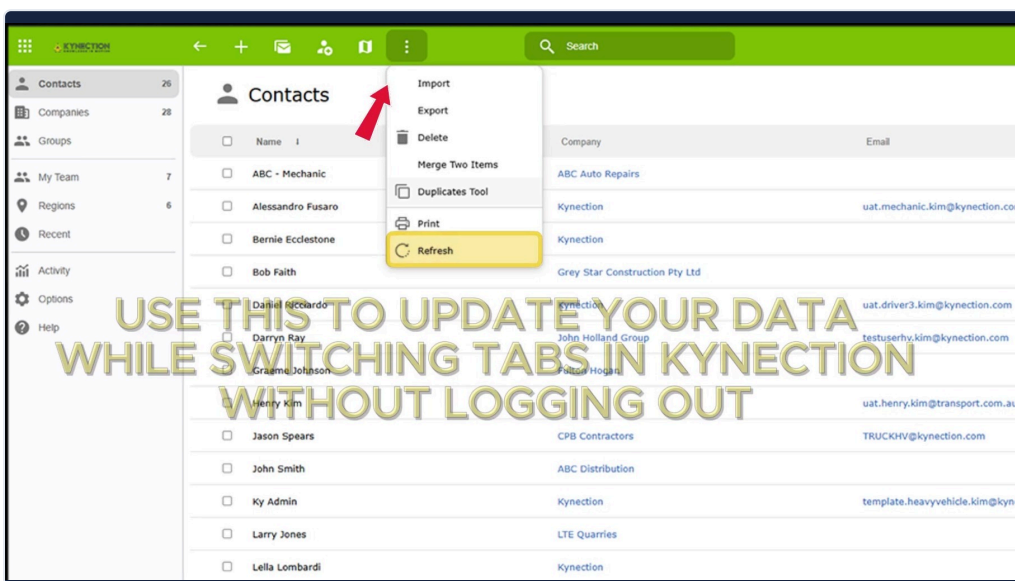


STEP 3 • 03:19 IN THE VIDEO

Find possible duplicates

The duplicate check surfaces contacts that look like the same person or company entered twice.

CHAPTER 04 • STEP 3 OF 4



STEP 4 • 03:34 IN THE VIDEO

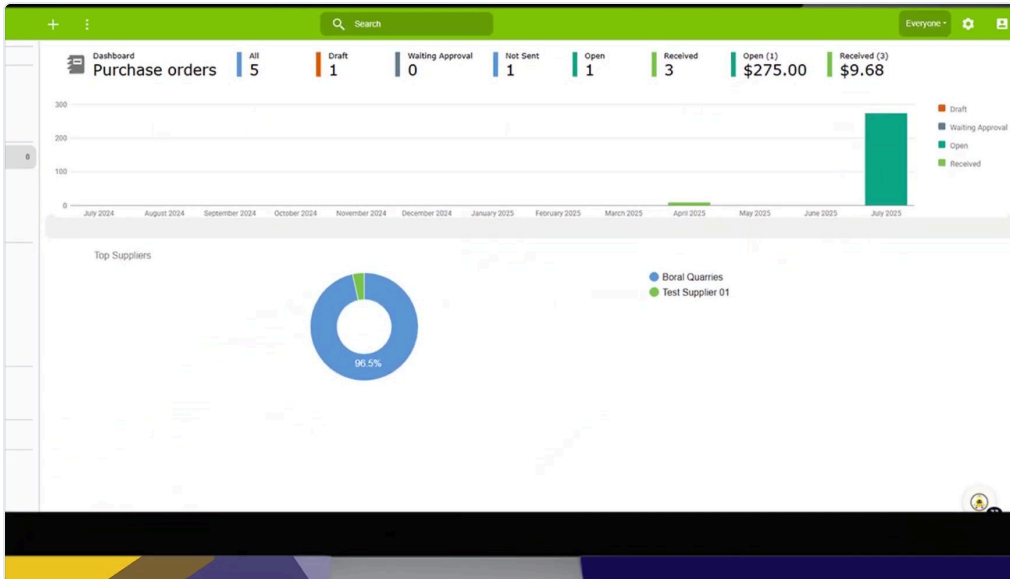
Refresh after switching views

Data needs refreshing after switching user views, or you can be looking at a stale list.

CHAPTER 04 • STEP 4 OF 4

Exporting and importing

The part where care matters most.

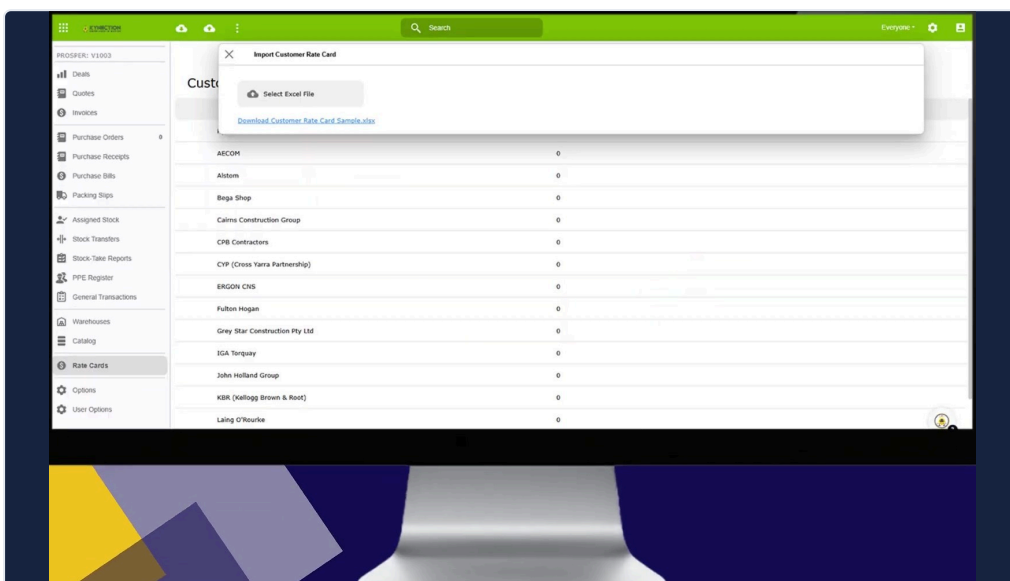


STEP 1 • 03:50 IN THE VIDEO

Read your dashboard

What appears on your dashboard depends on your access level and the views you have been given, here showing purchase orders by status and supplier.

CHAPTER 05 • STEP 1 OF 5



STEP 2 • 04:05 IN THE VIDEO

Export the data

Kynecton data exports for editing outside the system.

CHAPTER 05 • STEP 2 OF 5

Exporting and importing

Export Example														
id	product	company	base price	sales tax	discount	base cost	project	role	minquantity	maxquantity	invoice name	description	warehouse	sales code
4E1905451986402E180D7F84E20891	14mm Aggregate	Kynection	115	10		0	Kynection		0	0			1	
6807E48F3176506AA1F9378885D0EC	Additional Maintenance Item	Kynection	100	10		100	Kynection		0	0			1	
D40C986480C080F57F837C7C27E57	Air Filter Inner - K127260X	Kynection	50	10		40	Kynection		0	0			1	
0629C7937878F8384CAE3085671CA	Air Filter Primary - PS35770	Kynection	60	10		48	Kynection		0	0			1	
148D5412567C995CF55D77715C8E	Brake Light	Kynection	250	10		200	Kynection		0	0			1	
089F49F0644184473a7e78b840	Cancellation fee	Kynection	100	10		80	Kynection		0	0			1	
420F39593114297883a065043591	Compressor	Kynection	500	10		400	Kynection		0	0			1	
13152F88C728388C8AC37C70721	Coilrent	Kynection	40	10		32	Kynection		0	0			1	
3074E97EFA2D030554858AA38C8F8	Counter JB	Kynection	50	10		40	Kynection		0	0			1	
1A0CC397C5C222CA9896490F4289	Counterweight	Kynection	50	10		40	Kynection		0	0			1	
60E73FEF88F303F15C0AC4798B2	Differential oil	Kynection	40	10		32	Kynection		0	0			1	
A0E7C030E8C73413C27303E383F	Drive Axle Oil	Kynection	45	10		36	Kynection		0	0			1	
D0C8A7677427F8E0A7A7C8721160	Drums	Kynection	80	10		64	Kynection		0	0			1	
509168268F28CC95D459885669F1E	Engine Oil - TO-TOW40	Kynection	50	10		40	Kynection		0	0			1	
8E3380E7ED56A0A0A20E4860C3F3	Engine Oil Filter - C1031	Kynection	46	10		37	Kynection		0	0			1	
5088F627EAB170AF1E12121E2C2D	Filter	Kynection	40	10		39	Kynection		0	0			1	
4AC79358881748E04F780746276	Foundation	Kynection	600	10		480	Kynection		0	0			1	
46ACD0514FAE408AC21254E2643A3	Frames	Kynection	800	10		640	Kynection		0	0			1	
3FAC3AC6A7A6835C43502A98148F	Fuel Filter - PS50012	Kynection	65	10		52	Kynection		0	0			1	
F1D7C713C1381031809A8A4230865	Fuel Water Separator Element	Kynection	80	10		64	Kynection		0	0			1	
3797C56780717941275A081331810	Graze	Kynection	75	10		60	Kynection		0	0			1	
7338057086128AC83D307C937F78	Headlight - Adhoc	Kynection	95	10		76	Kynection		0	0			1	
252F0A8598586F1E84DE9F8041D6	Hoist	Kynection	250	10		200	Kynection		0	0			1	
D0451005F8F40C0509F3181170710	MultiTap - Adhoc	Kynection	75	10		60	Kynection		0	0			1	
ASC8127008355C768358C8D40	Oil Filter	Kynection	25	10		20	Kynection		0	0			1	
3F187860862EA3962A158C0E0A18	Operation Cab	Kynection	2600	10		2080	Kynection		0	0			1	
56C1E7995712F3FA488B0E3A26183	Pallets	Kynection	65	10		52	Kynection		0	0			1	
4E1905451986402E180D7F84E20891	14mm Aggregate	Jacks Wholesale	115	10		92	Elipse		0	0			1	
6807E48F3176506AA1F9378885D0EC	Additional Maintenance Item	Jacks Wholesale	100	10		80	Elipse		0	0			1	
D40C986480C080F57F837C7C27E57	Air Filter Inner - K127260X	Jacks Wholesale	50	10		40	Elipse		0	0			1	
0629C7937878F8384CAE3085671CA	Air Filter Primary - PS35770	Jacks Wholesale	60	10		48	Elipse		0	0			1	
148D5412567C995CF55D77715C8E	Brake Light	Jacks Wholesale	250	10		200	Elipse		0	0			1	

STEP 3 • 04:20 IN THE VIDEO

Review the export

The exported file carries one row per record with the ID column first, ready to edit outside the system.

CHAPTER 05 • STEP 3 OF 5

PROSPER: V1003

Deals

Quotes

Invoices

Purchase Orders

Purchase Receipts

Purchase Bills

Packing Slips

Assigned Stock

Stock Transfers

Stock-Take Reports

PPE Register

General Transactions

Warehouses

Catalog

Rate Cards

Import Customer Rate Card

Select Excel File

Download Customer Rate Card Sample.xlsx

AECOM	0
Alstom	0
Bega Shop	0
Calms Construction Group	0
CPB Contractors	0
CYP (Cross Yarra Partnership)	0
ERGON CNS	0
Fulton Hogan	0
Grey Star Construction Pty Ltd	0
IGA Torquay	0
John Holland Group	0

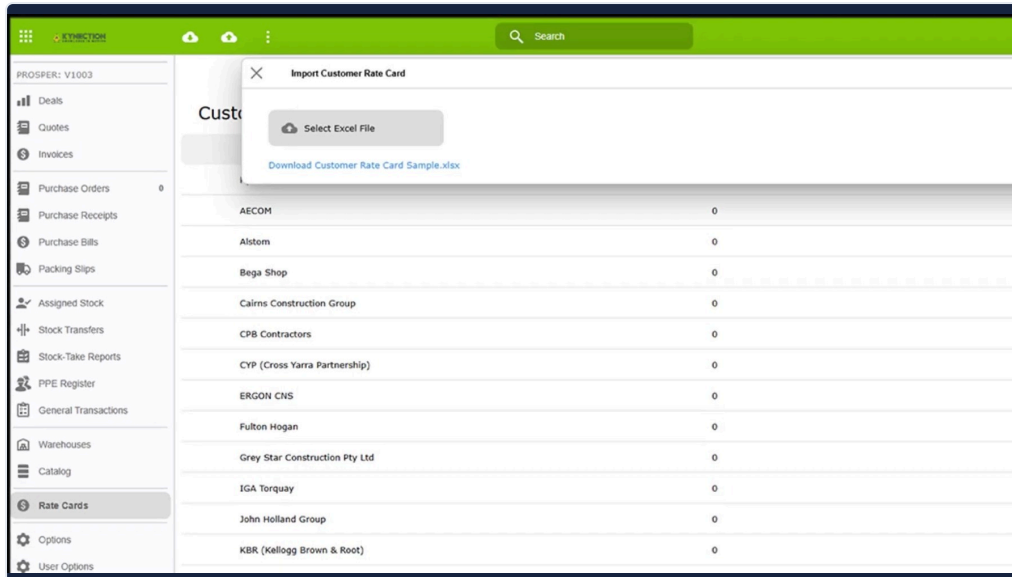
STEP 4 • 04:40 IN THE VIDEO

Import the rate card

The customer rate card import takes the edited file and matches each row back by its ID.

CHAPTER 05 • STEP 4 OF 5

Exporting and importing



STEP 5 • 05:01 IN THE VIDEO

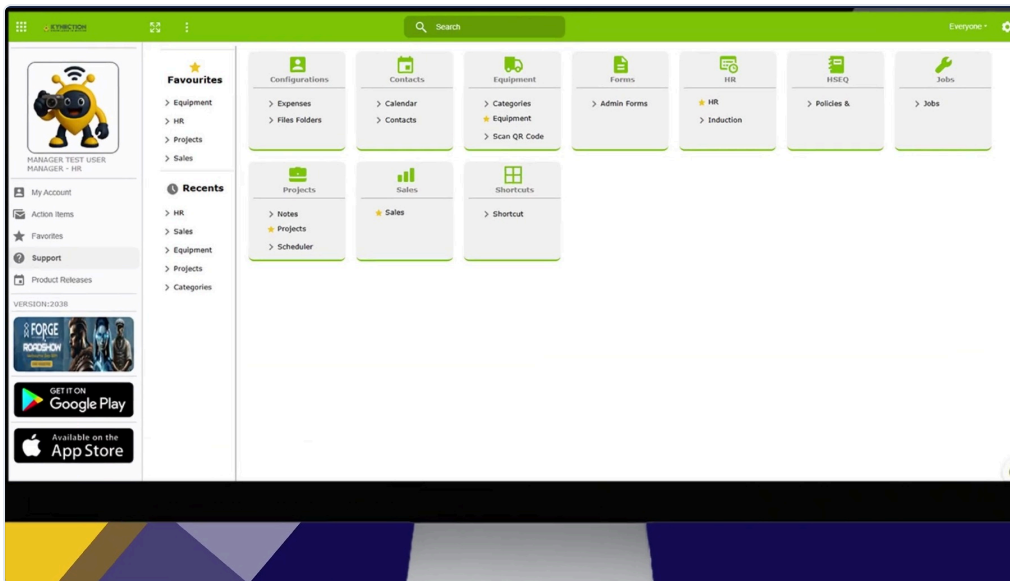
Test before committing

Import a small sample first and confirm it landed correctly before running the full file.

CHAPTER 05 • STEP 5 OF 5

Errors and support

What to do when an import fails, and how to reach Kynection.

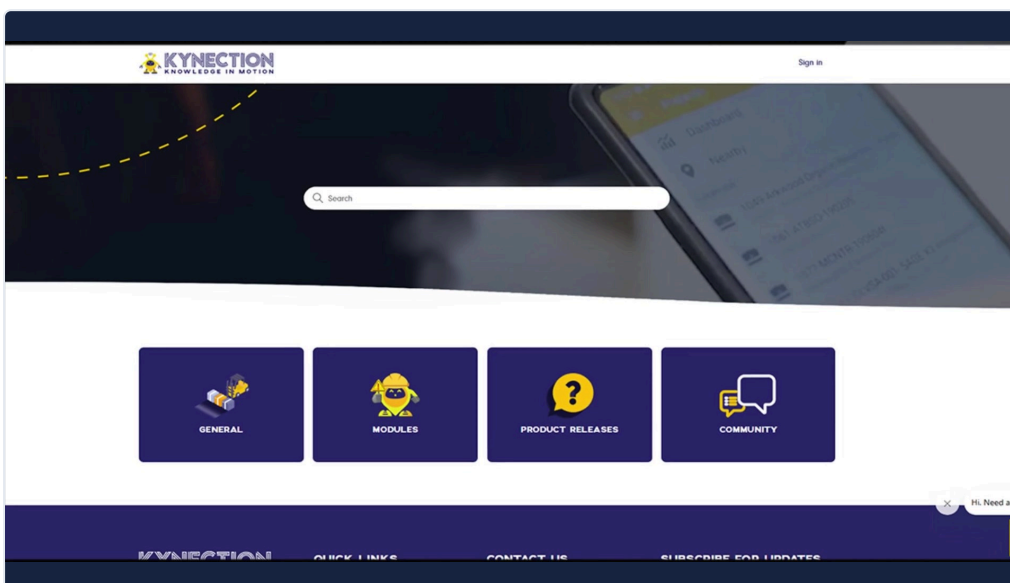


STEP 1 • 05:22 IN THE VIDEO

Check the dashboard after import

Returning to the dashboard confirms the imported data has landed where you expected.

CHAPTER 06 • STEP 1 OF 4



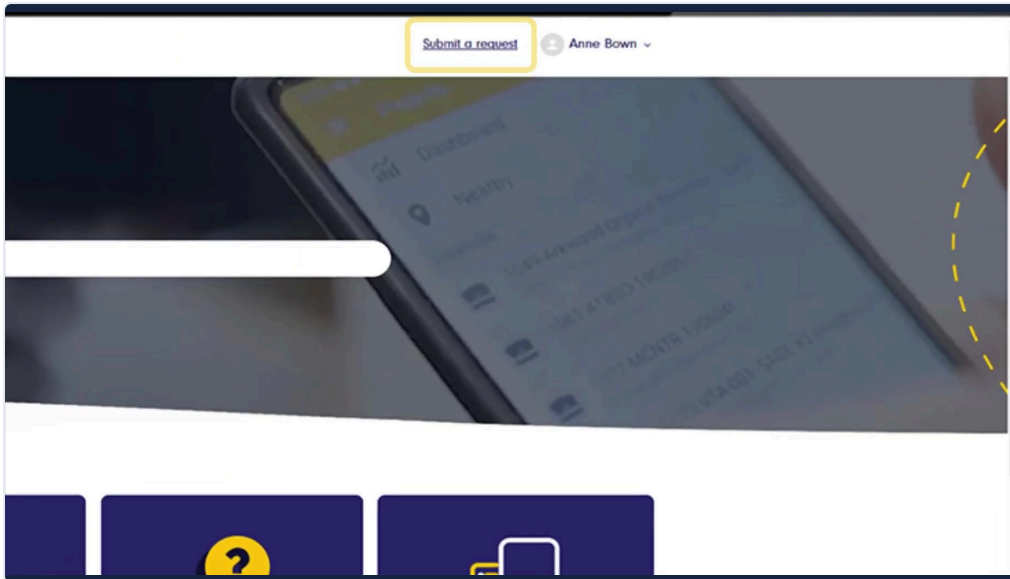
STEP 2 • 05:42 IN THE VIDEO

Contact Kynection support

Support is reachable from within the product.

CHAPTER 06 • STEP 2 OF 4

Errors and support



STEP 3 • 06:05 IN THE VIDEO

Search the knowledge base

The knowledge base answers most questions without raising a ticket.

CHAPTER 06 • STEP 3 OF 4

A screenshot of a web application form titled 'Submit a request'. The form includes a dropdown menu for 'Please choose your issue below' with 'KIM Request' selected. Below this, there is a yellow box highlighting the 'CC (optional)' field and the 'Add emails' button. The form also has fields for 'Subject' and 'Description'. The 'Description' field has a rich text editor with icons for bold, italic, underline, list, link, and unlink. At the bottom, there are dropdown menus for 'Module/s Affected' and 'Module Other (optional)'. A note at the bottom of the form states: 'Please enter the details of your request. A member of our support staff will respond as soon as possible.'

STEP 4 • 06:21 IN THE VIDEO

Submit a support request

A request is submitted with the detail of what went wrong. Refresh your browser before submitting.

CHAPTER 06 • STEP 4 OF 4