



KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION • PROJECTS • PART 3 OF THE PROJECTS MODULE

Track, Complete and *Export Jobs*

Tasks and jobs from the phone: what is open, what is overdue, the commercial detail on a job, and getting a job out as a PDF without going back to the office.

3 CHAPTERS

1 MIN 5 SEC

PROJECTS

MOBILE USERS • SITE TEAMS

FEATURE GUIDE • 1 MIN 5 SEC

What this feature covers

Three stages, six steps: the task list, the job detail, and exporting or adding to a job.

CH 01	Work the task list Tasks are grouped by what is open and what has run late.	00:00–00:20
CH 02	Open a job Jobs reached from the project dashboard carry staff, customer and finance.	00:20–00:50
CH 03	Export and add to a job Send the job out, or keep building it as work proceeds.	00:50–01:05

- **Overdue is spelled out.** Late tasks show how long they have been outstanding rather than just a past date.
- **Jobs carry margin.** The finance block on a job shows total cost and profit, so the commercial position is visible in the field.
- **Export goes out from the phone.** A job PDF can be downloaded or emailed on the spot.

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

Work the task list

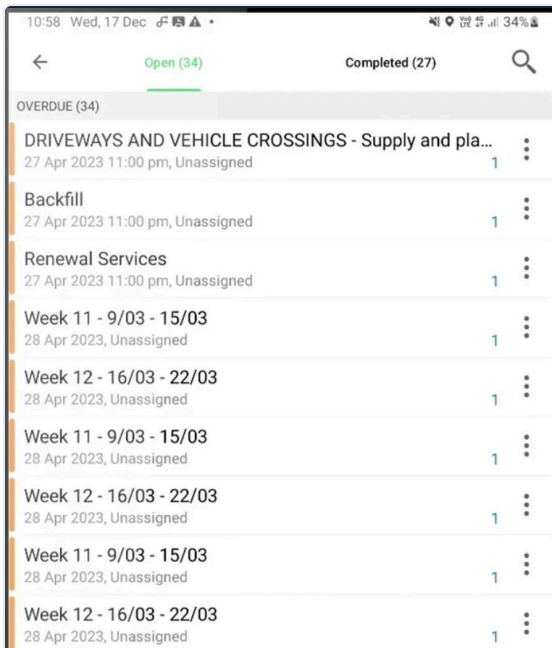
Tasks are grouped by what is open and what has run late.

STEP 1 • 00:05 IN THE VIDEO

Read the tasks

The list shows open and completed counts, with overdue items flagged by how long they have been outstanding.

CHAPTER 01 • STEP 1 OF 2

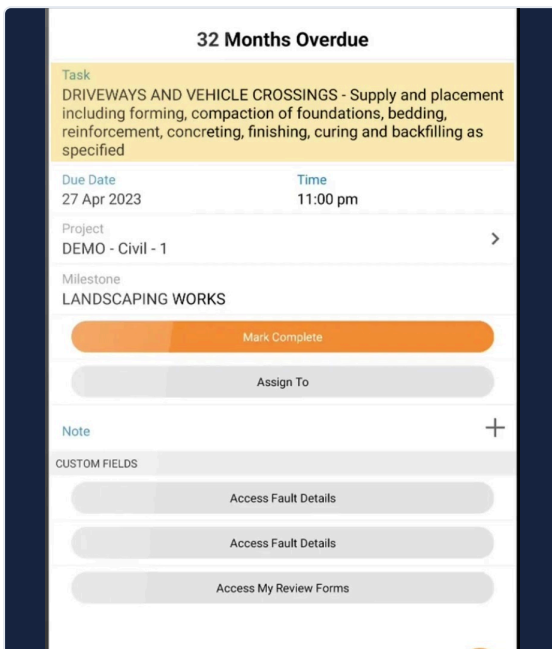


STEP 2 • 00:15 IN THE VIDEO

Open a task

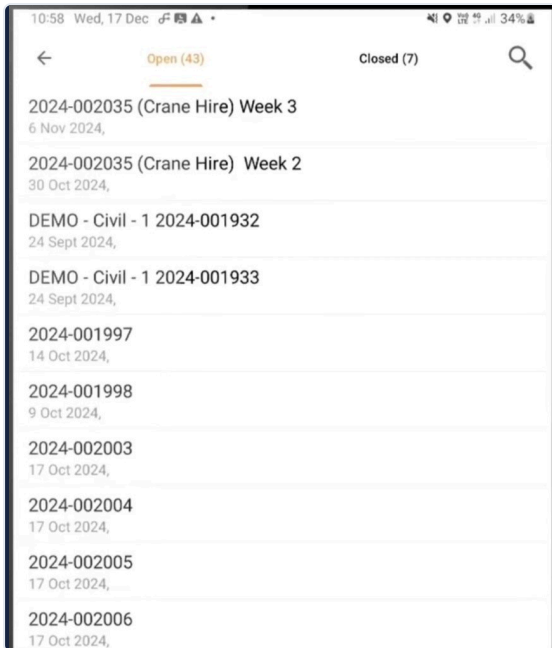
The detail carries the due date, project, milestone and custom fields, and can be assigned to someone else.

CHAPTER 01 • STEP 2 OF 2



Open a job

Jobs reached from the project dashboard carry staff, customer and finance.

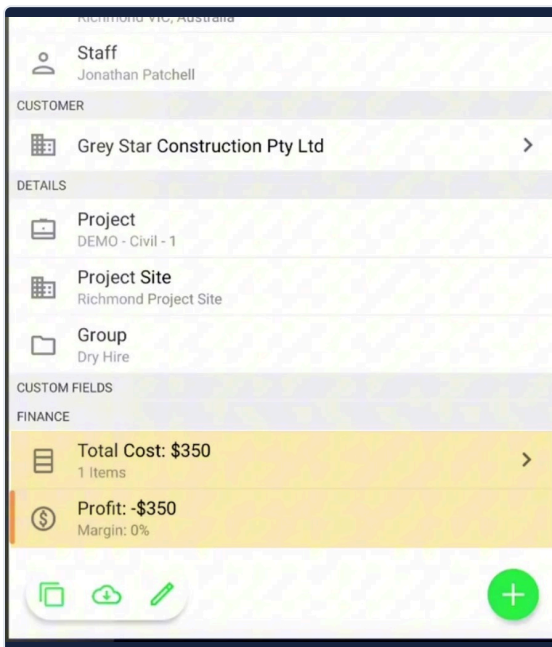


STEP 1 • 00:27 IN THE VIDEO

Read the job list

Jobs list with their number and date under the project's Jobs tile.

CHAPTER 02 • STEP 1 OF 2



STEP 2 • 00:40 IN THE VIDEO

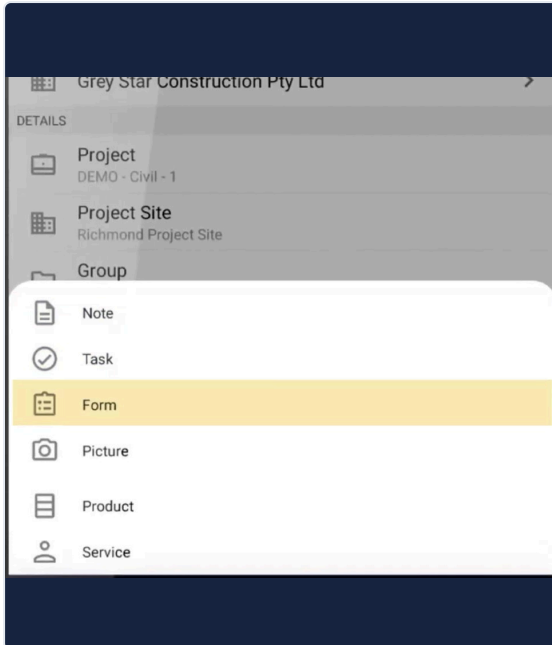
Read the job detail

The job shows staff, customer, project, project site and group, with custom fields and a finance block giving total cost and profit.

CHAPTER 02 • STEP 2 OF 2

Export and add to a job

Send the job out, or keep building it as work proceeds.



STEP 1 • 00:54 IN THE VIDEO

Add items to the job

The add menu attaches a note, task, form, picture, product or service to the job.

CHAPTER 03 • STEP 1 OF 2



STEP 2 • 01:01 IN THE VIDEO

Export the job

Export PDF produces the job document, which can be downloaded or emailed straight from the phone.

CHAPTER 03 • STEP 2 OF 2

NEXT

Where to go next

This guide covers one part of the projects module. The rest of the series covers the module end to end.

NEXT UP - Projects Mobile 04

Project info, finance, plans and AI analysis

BACK TO Projects Mobile 02

Navigate projects, sites and assets

THE REST OF THE PROJECTS MODULE

Ask your Kynecton account manager for the other guides in this series

MORE IN THIS MODULE

Projects
Mobile 01

Manage projects, tasks and jobs on mobile (module overview)

Projects
Mobile 02

Navigate projects, sites and assets

Projects
Mobile 04

Project info, finance, plans and AI analysis
