



KYNECTION
KNOWLEDGE IN MOTION

MODULE OVERVIEW

KYNECTION · SALES (PROSPER) · SALES MOBILE

Run the Sales Pipeline *From Your Phone*

The whole Prosper pipeline on a phone: capturing leads, reading the deals forecast, building and confirming a quote, tracking invoices to paid, and raising purchase orders and receipts from site.

6 CHAPTERS

4 MIN 7 SEC

SALES (PROSPER)

MOBILE USERS · SALES

MODULE OVERVIEW · 4 MIN 7 SEC

What this module overview covers

Six stages cover the mobile app end to end. Chapters 1 and 2 are leads and the deals forecast. Chapters 3 and 4 build and confirm a quote. Chapters 5 and 6 cover invoices, purchase orders and receipts.

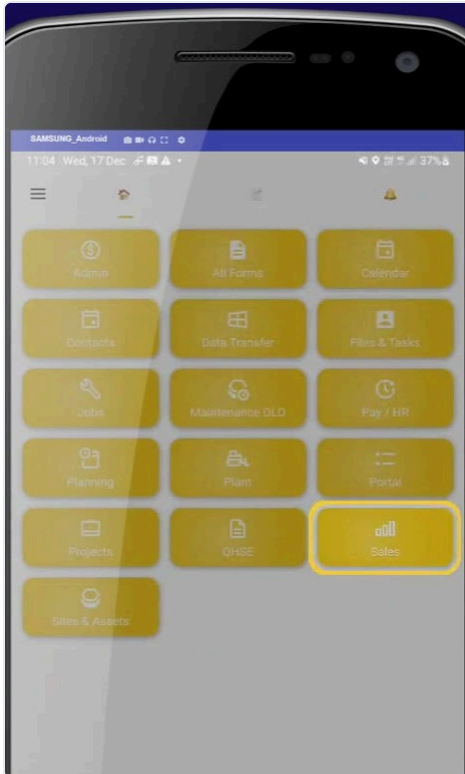
CH 01	Leads and the dashboard Sales and inventory sit behind one set of tiles on the app.	00:10–00:44
CH 02	Read the deals forecast The mobile deals dashboard carries the same forecast as the web, charted three ways.	00:44–01:21
CH 03	Build a quote Quotes are built on the phone with the same structure as the web.	01:21–02:26
CH 04	Confirm and export A confirmed quote can be previewed and sent without going back to a desk.	02:26–02:56
CH 05	Track invoices The invoice dashboard is the receivables picture in your pocket.	02:56–03:20
CH 06	Purchase orders and receipts Buying works from the phone too, including receipting goods as they arrive.	03:20–04:06

- **Everything the web does, in the field.** Quotes built on a phone carry the same sections, line items and approval route as those built at a desk.
- **Leads can be imported.** A new lead is either matched to an existing contact or created fresh, so the same company does not end up in the system twice.
- **Quotes export as PDFs.** A confirmed quote can be previewed and sent from the phone, on the client's letterhead.

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

Leads and the dashboard

Sales and inventory sit behind one set of tiles on the app.

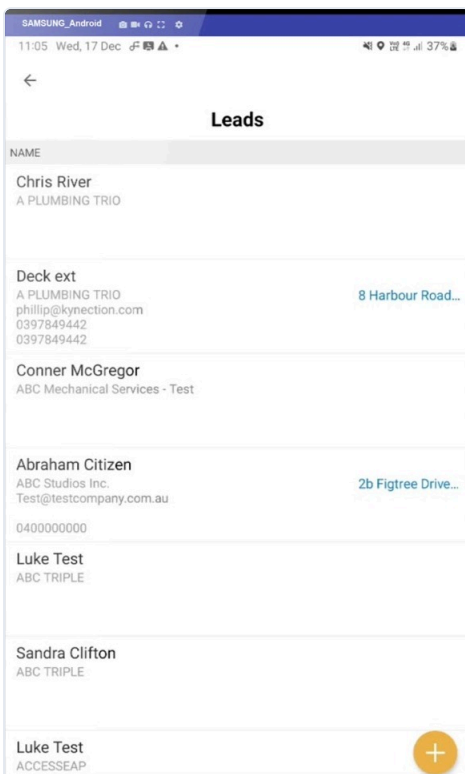


STEP 1 • 00:14 IN THE VIDEO

Open sales and inventory

The dashboard tiles cover the sales and inventory functions available to you on the phone.

CHAPTER 01 • STEP 1 OF 3



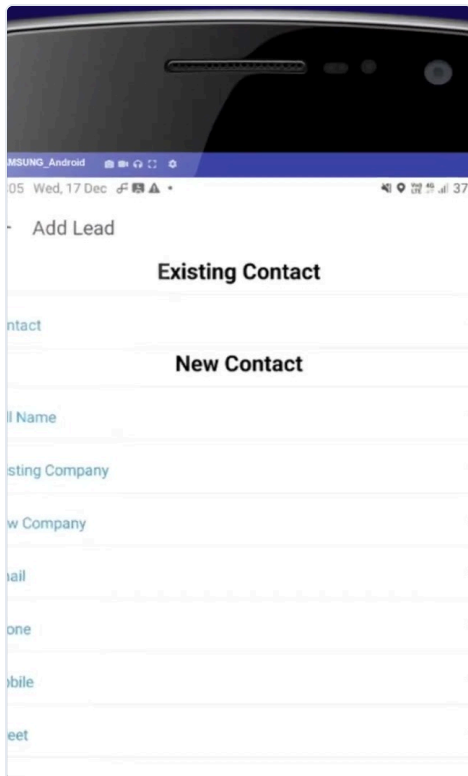
STEP 2 • 00:25 IN THE VIDEO

Read the leads list

Leads list with their contact and company, so you can pick up where the last conversation left off.

CHAPTER 01 • STEP 2 OF 3

Leads and the dashboard



STEP 3 • 00:38 IN THE VIDEO

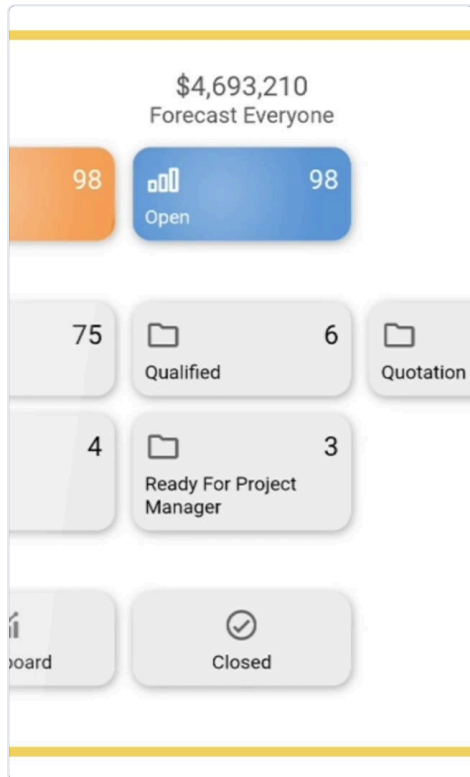
Add a lead

A new lead is either matched to an **Existing Contact** or entered as a **New Contact** with name, company, email, phone, mobile and address.

CHAPTER 01 • STEP 3 OF 3

Read the deals forecast

The mobile deals dashboard carries the same forecast as the web, charted three ways.

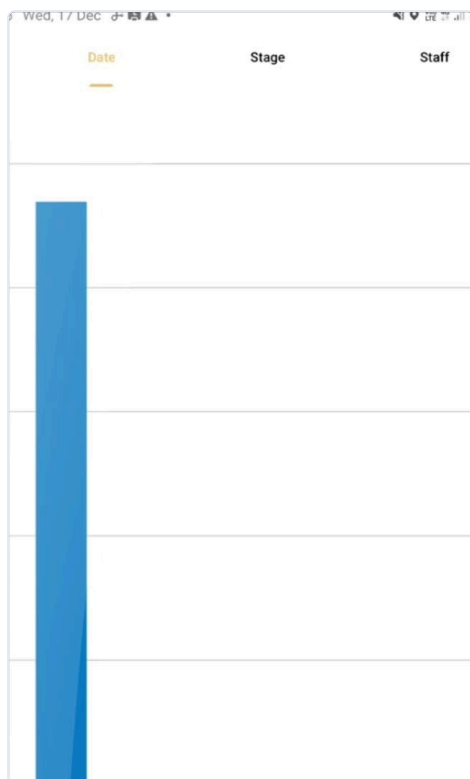


STEP 1 • 00:50 IN THE VIDEO

Read the pipeline

The forecast total sits above the stage counts: overdue, open, incoming, qualified, quotation, closure and ready for project manager.

CHAPTER 02 • STEP 1 OF 3



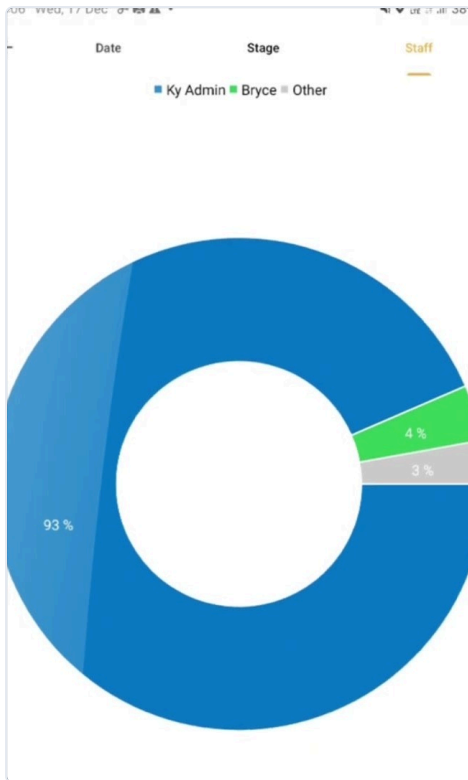
STEP 2 • 01:05 IN THE VIDEO

Chart by date

The date graph shows the pipeline over time, so a thin month ahead is visible early.

CHAPTER 02 • STEP 2 OF 3

Read the deals forecast



STEP 3 • 01:16 IN THE VIDEO

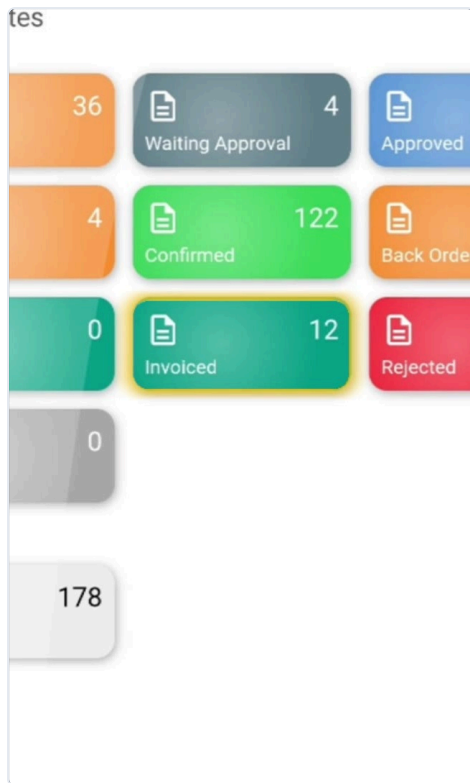
Chart by stage and staff

The donut splits the same pipeline by stage and by staff member.

CHAPTER 02 • STEP 3 OF 3

Build a quote

Quotes are built on the phone with the same structure as the web.

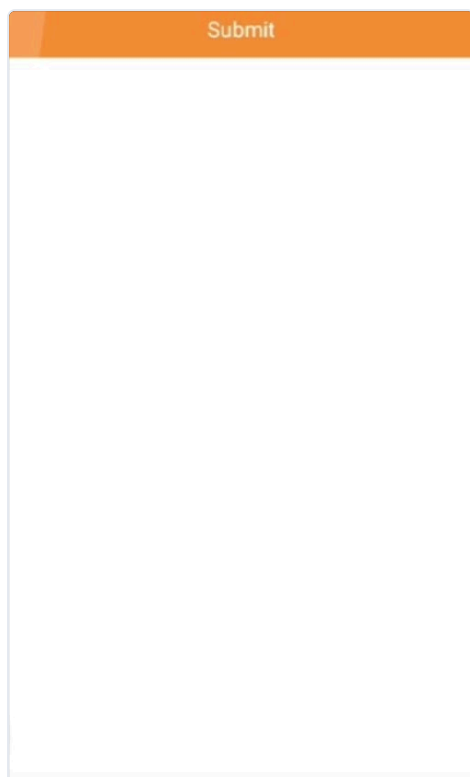


STEP 1 · 01:30 IN THE VIDEO

Read the quotes dashboard

Quotes are counted by status: draft, waiting approval, approved, confirmed, back order, proforma, invoiced, rejected and templated.

CHAPTER 03 · STEP 1 OF 4



STEP 2 · 01:45 IN THE VIDEO

Start the draft

A new quote opens as a draft with its total ready to build up and a **Submit** button at the top.

CHAPTER 03 · STEP 2 OF 4

Build a quote

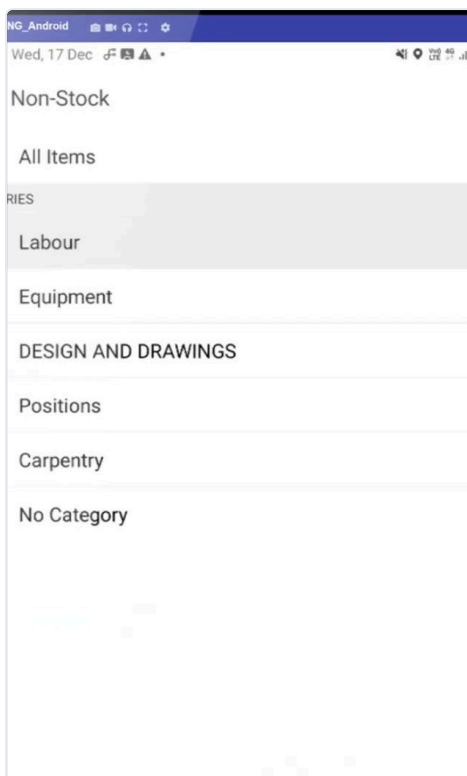


STEP 3 • 02:02 IN THE VIDEO

Add sections and lines

Sections and line items are added from the same menu as the web version.

CHAPTER 03 • STEP 3 OF 4



STEP 4 • 02:18 IN THE VIDEO

Pick from the catalogue

Items are chosen by category: all items, labour, equipment, design and drawings, positions, carpentry or no category.

CHAPTER 03 • STEP 4 OF 4

Confirm and export

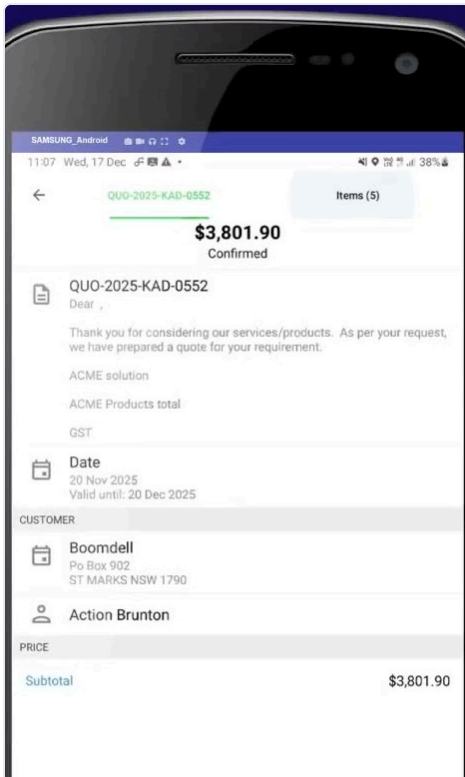
A confirmed quote can be previewed and sent without going back to a desk.

STEP 1 • 02:35 IN THE VIDEO

Confirm the quote

The quote shows its total and moves to confirmed once approved.

CHAPTER 04 • STEP 1 OF 2



STEP 2 • 02:50 IN THE VIDEO

Export the PDF

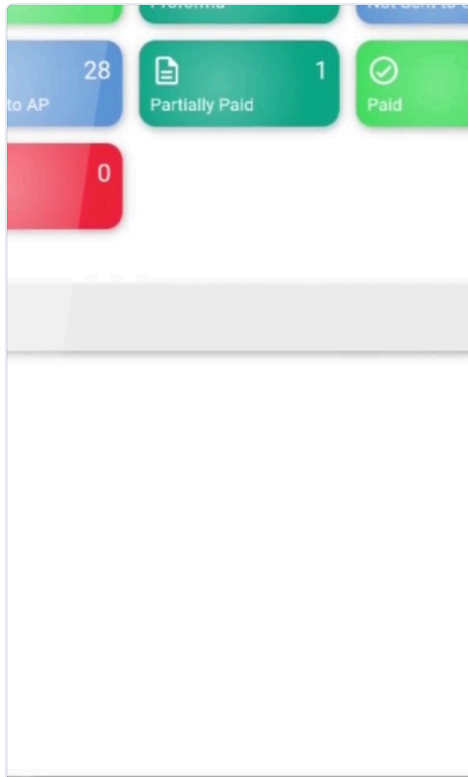
The confirmation exports as a PDF on the client's letterhead, ready to send from the phone.

CHAPTER 04 • STEP 2 OF 2



Track invoices

The invoice dashboard is the receivables picture in your pocket.



STEP 1 • 03:05 IN THE VIDEO

Read the invoice statuses

Invoices are counted as not sent, partially paid, paid and rejected, with the full list beneath.

CHAPTER 05 • STEP 1 OF 2

IAL ARENA 2025	\$
AD-0398 BING TRIO 025	\$
25-KAD-0395 BING TRIO 2025	\$
25-KAD-0390 Charge-up 2025	\$
25-KAD-0389 omer 025	\$
25-KAD-0384 ICAL AUTO ACME 025	\$
00045 - KRK Consulting Service onsulting Service 025	\$
25-KAD-0377 PLE 025	\$
24-KAD-0365 / DIAMOND 024	\$
24-KAD-0358	\$

STEP 2 • 03:15 IN THE VIDEO

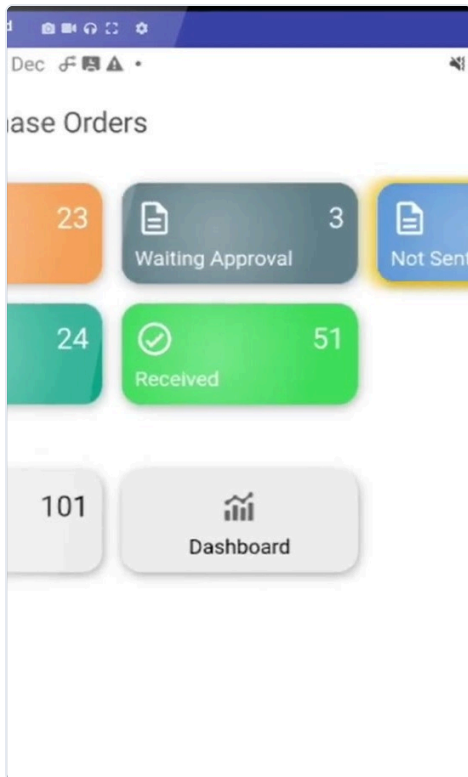
Open the ledger

Each invoice lists with its number, date and value, so an overdue account is visible on site.

CHAPTER 05 • STEP 2 OF 2

Purchase orders and receipts

Buying works from the phone too, including receipting goods as they arrive.

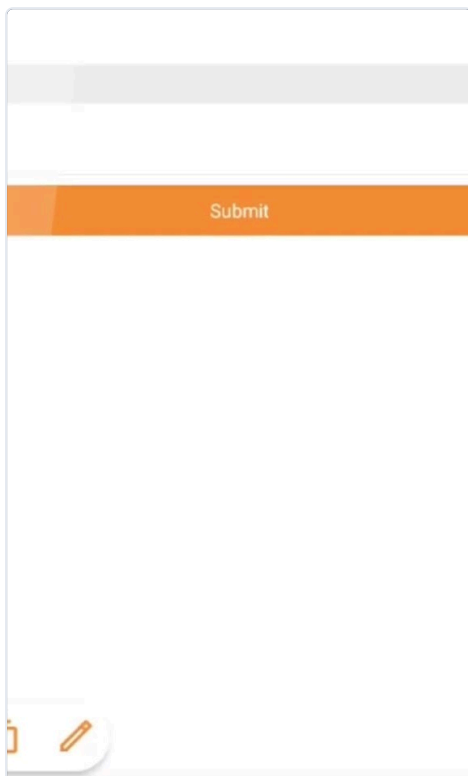


STEP 1 • 03:28 IN THE VIDEO

Read the orders dashboard

Purchase orders are counted as draft, waiting approval, not sent, open and received.

CHAPTER 06 • STEP 1 OF 3



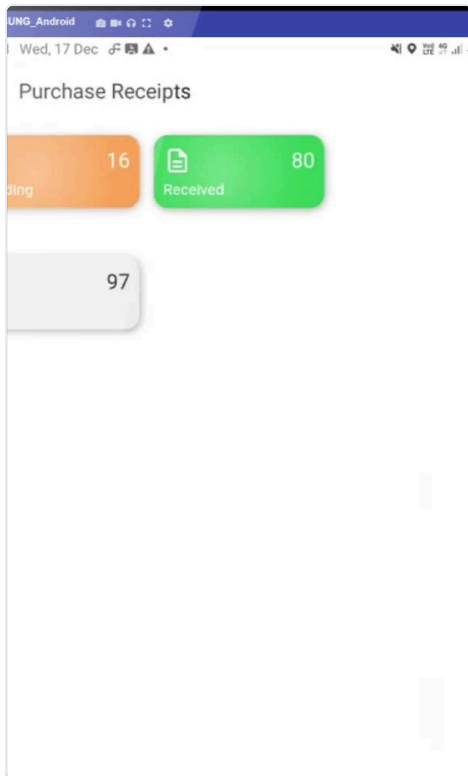
STEP 2 • 03:40 IN THE VIDEO

Raise an order

A new order takes the supplier and its lines, totalling as you add them, then submits for approval.

CHAPTER 06 • STEP 2 OF 3

Purchase orders and receipts



STEP 3 • 03:52 IN THE VIDEO

Record the receipts

Purchase receipts are recorded against the order as goods arrive, so stock and cost stay current without a trip back to the office.

CHAPTER 06 • STEP 3 OF 3