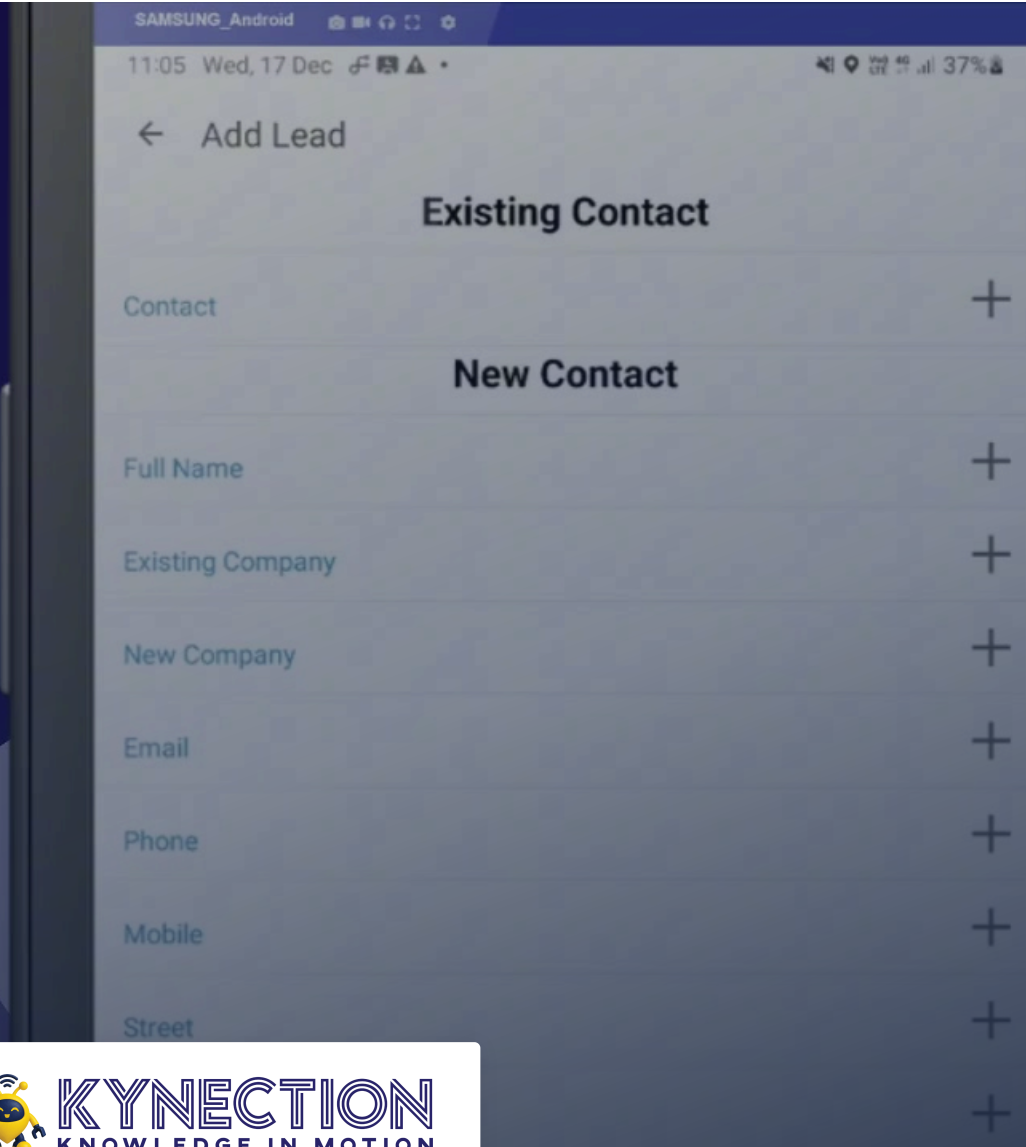




FEATURE GUIDE

KYNECTION • SALES (PROSPER) • PART 2 OF SALES MOBILE

Manage Leads and *Sales Forecasts*

The front of the pipeline on a phone. Working the leads list, adding a lead against an existing contact or a new one, and reading the forecast by stage and by staff.

3 CHAPTERS

1 MIN 22 SEC

SALES (PROSPER)

MOBILE USERS • SALES

What this feature covers

Three stages, five steps: opening the module, working leads, and reading the forecast.

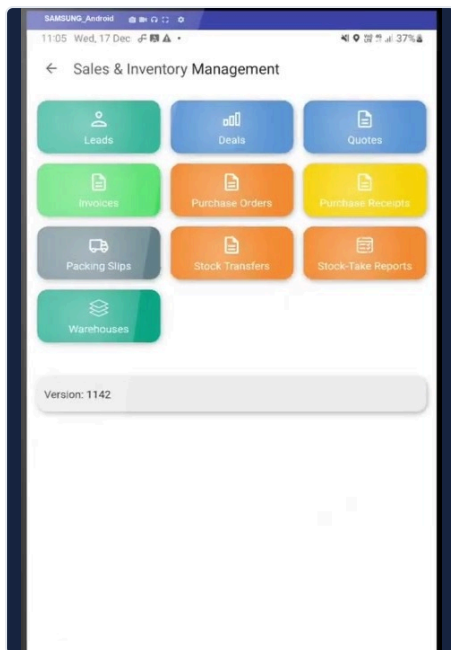
CH 01	Open the module Sales and inventory sit behind one set of tiles.	00:00–00:34
CH 02	Add a lead Attach to someone already in the system, or create them.	00:34–00:46
CH 03	Read the forecast The same pipeline figures as the web, charted for a small screen.	00:46–01:22

- **Match before you create.** A new lead is either attached to an existing contact or entered fresh, which is what stops the same company appearing twice.
- **The forecast is weighted.** The dashboard shows the pipeline by stage, so a healthy total with nothing near closure is obvious.
- **Same data as the desk.** Leads and deals entered here are the same records the web module works from.

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.

Open the module

Sales and inventory sit behind one set of tiles.

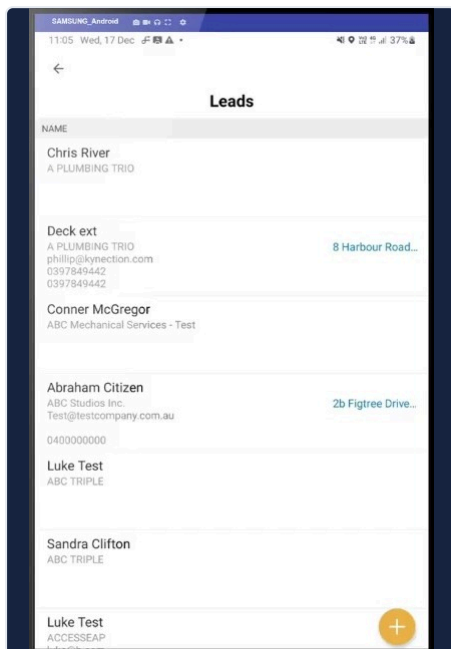


STEP 1 • 00:19 IN THE VIDEO

Open Sales and Inventory

The 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 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 2

Add a lead

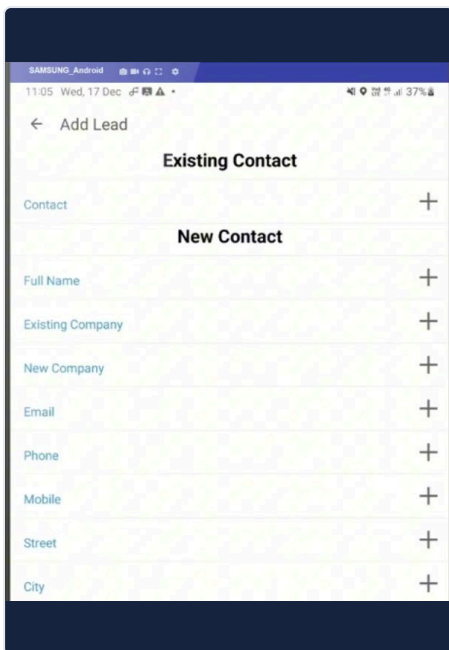
Attach to someone already in the system, or create them.

STEP 1 • 00:40 IN THE VIDEO

Choose existing or new

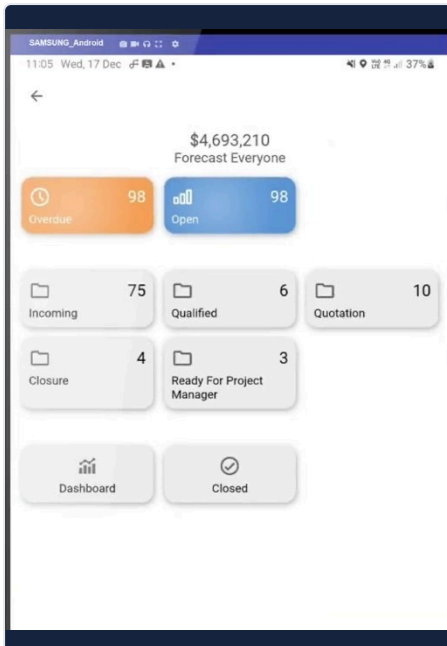
A new lead is either matched to an **Existing Contact** or entered as a **New Contact** with full name, company, email, phone, mobile, street and city.

CHAPTER 02 • STEP 1 OF 1



Read the forecast

The same pipeline figures as the web, charted for a small screen.

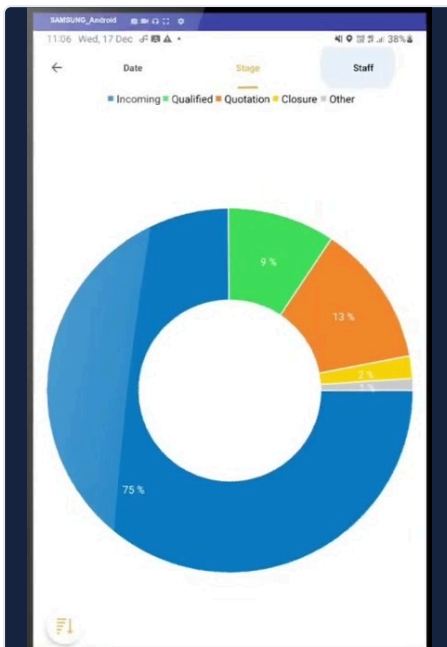


STEP 1 • 00:54 IN THE VIDEO

Read the pipeline

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

CHAPTER 03 • STEP 1 OF 2



STEP 2 • 01:12 IN THE VIDEO

Analyse the charts

The donut splits the same pipeline by stage, so where the value is concentrated is visible at a glance.

CHAPTER 03 • STEP 2 OF 2

NEXT

Where to go next

This guide covers one part of the sales module. The rest of the series follows the pipeline from lead to payment.

NEXT UP - Sales Mobile 03

Create quotes with sections and line items

BACK TO Sales Mobile 01

Run the sales pipeline from your phone (module overview)

THE REST OF THE SALES MODULE

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

MORE IN THIS MODULE

Sales
Mobile 01

Run the sales pipeline from your phone (module overview)

Sales
Mobile 03

Create quotes with sections and line items

Sales
Mobile 04

Export quotes and track invoices