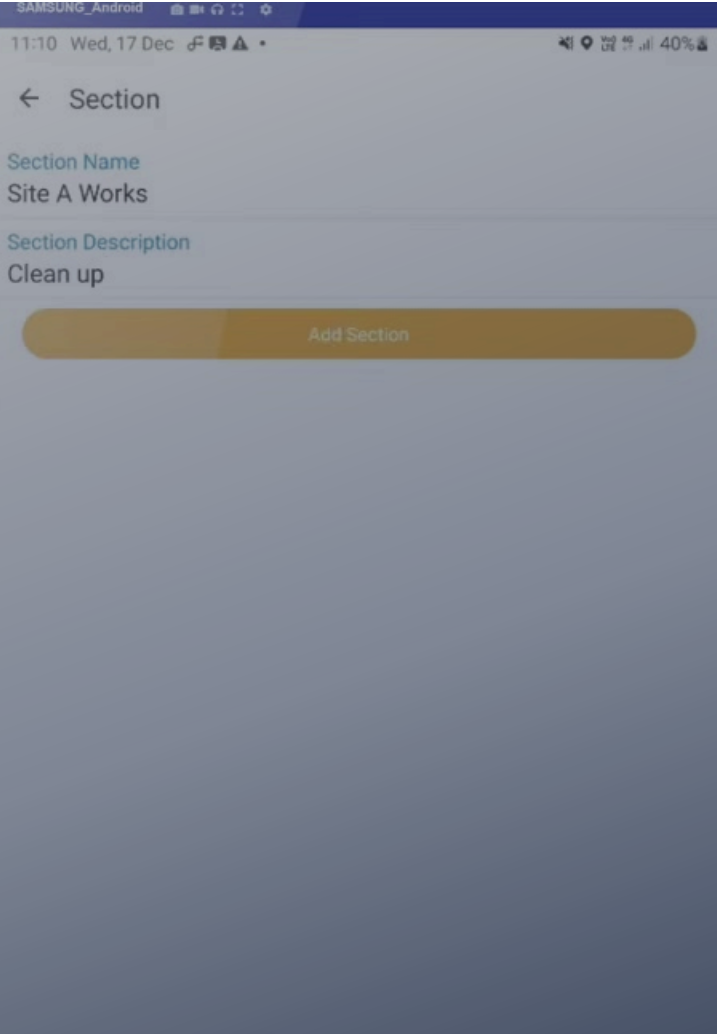




KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION · SALES (PROSPER) · PART 3 OF SALES MOBILE

Create Quotes with *Sections and Line Items*

Building a quote from the field. Reading the quote statuses, entering the customer detail, then structuring the quote into sections with their own priced line items.

3 CHAPTERS

1 MIN 6 SEC

SALES (PROSPER)

MOBILE USERS · SALES

What this feature covers

Three stages, four steps: quote statuses, creating the quote, then sections and line items.

CH 01	Read the quote statuses Quotes are counted by where each one has got to.	00:00–00:18
CH 02	Create the quote The header carries the customer, dates and terms.	00:18–00:39
CH 03	Add sections and line items Structure first, then price.	00:39–01:06

- **Sections come before lines.** A quote is structured into sections first, then each carries its own items, which is what keeps a large quote readable.
- **Templates save retyping.** The description can be pulled from a template rather than written each time.
- **Same approval route.** A quote built on a phone goes through the same submission and approval as one built at a desk.

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.

Read the quote statuses

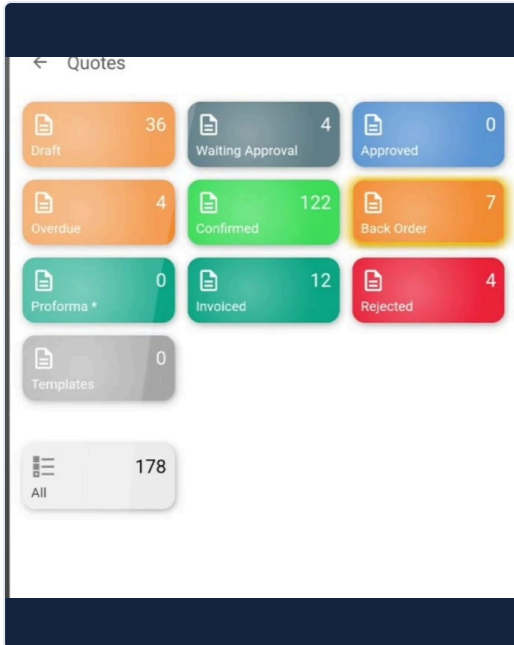
Quotes are counted by where each one has got to.

STEP 1 · 00:08 IN THE VIDEO

Open the quotes dashboard

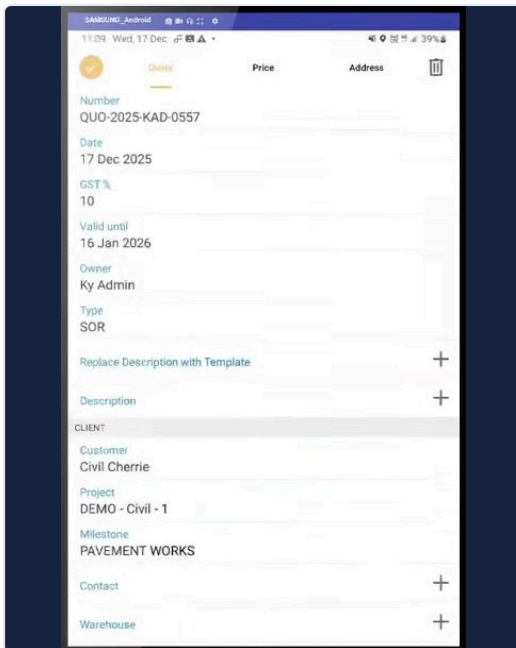
Quotes group by status: draft, waiting approval, approved, overdue, confirmed, back order, proforma, invoiced, rejected and templated, with the full list beneath.

CHAPTER 01 · STEP 1 OF 1



Create the quote

The header carries the customer, dates and terms.



STEP 1 • 00:27 IN THE VIDEO

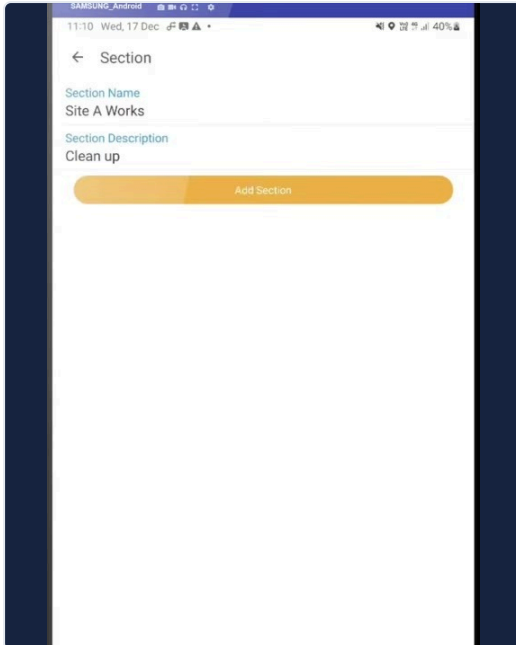
Enter the customer detail

The quote takes its number, date, valid-until, GST percentage and owner, with the customer, project and milestone set beneath. The description can come from a template.

CHAPTER 02 • STEP 1 OF 1

Add sections and line items

Structure first, then price.

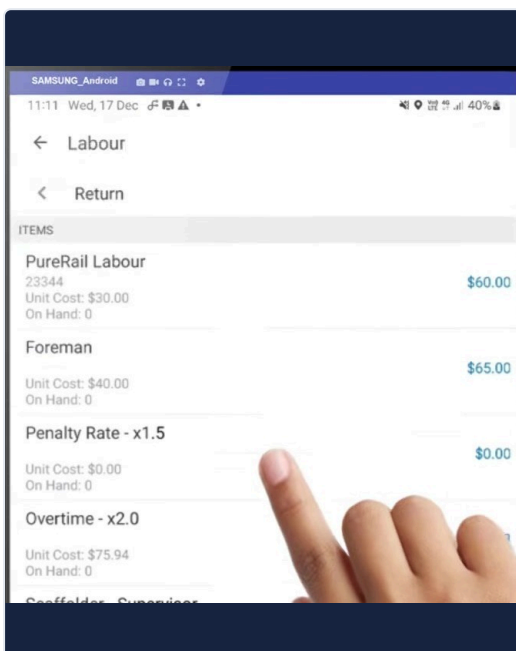


STEP 1 • 00:45 IN THE VIDEO

Add a section

A section takes its name and description, for example a site works or clean-up section, and groups the items beneath it.

CHAPTER 03 • STEP 1 OF 2



STEP 2 • 00:58 IN THE VIDEO

Add the line items

Items are added into the section with their unit cost, on-hand quantity and rate, covering labour, foreman time, penalty rates and overtime.

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 04

Export quotes and track invoices

BACK TO Sales Mobile 02

Manage leads and sales forecasts

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 02

Manage leads and sales forecasts

Sales
Mobile 04

Export quotes and track invoices