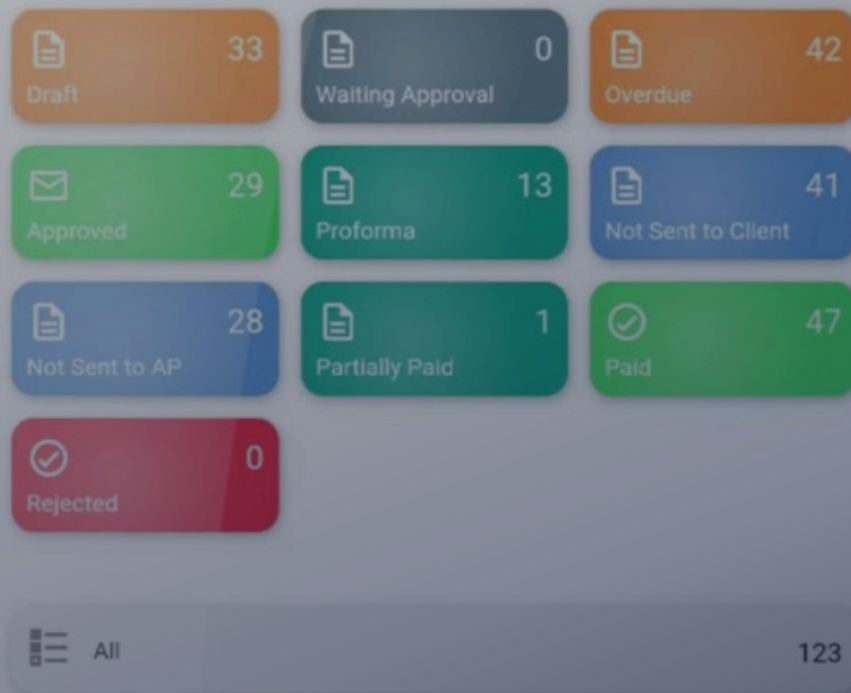




KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION • SALES (PROSPER) • PART 4 OF SALES MOBILE

Export Quotes and *Track Invoices*

Closing the loop from the field. Reviewing a confirmed quote and sending it as a PDF on the client's letterhead, then tracking invoices, purchase orders and receipts from the phone.

4 CHAPTERS

1 MIN 41 SEC

SALES (PROSPER)

MOBILE USERS • SALES

FEATURE GUIDE • 1 MIN 41 SEC

What this feature covers

Four stages, seven steps: the confirmed quote and its PDF, invoice tracking, then purchase orders and receipts.

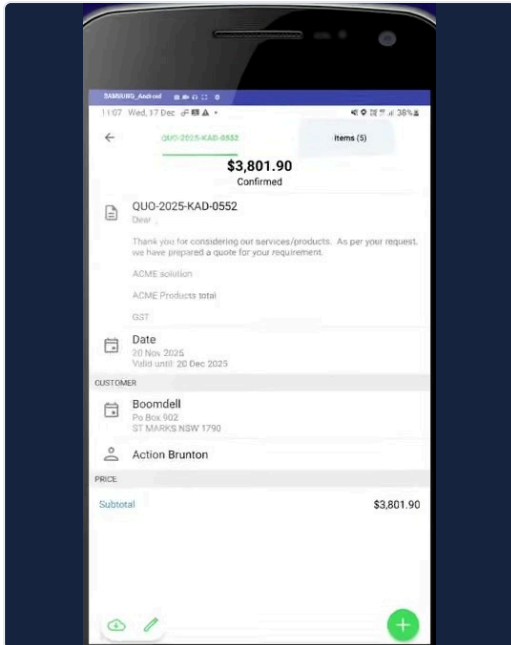
CH 01	Review and export the quote A confirmed quote goes out as a PDF from the phone.	00:00–00:32
CH 02	Track invoices The receivables picture, grouped by status.	00:32–00:54
CH 03	Purchase orders The buying side of the same app.	00:54–01:22
CH 04	Purchase receipts Recording what actually arrived.	01:22–01:41

- **The PDF is client-ready.** The export carries the letterhead and terms, so it can go straight to the customer without a trip back to the office.
- **Invoices are grouped by status.** Not sent, partially paid and paid, so an overdue account is visible on site.
- **Buying works here too.** Purchase orders and receipts can be raised and recorded from the same app.

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.

Review and export the quote

A confirmed quote goes out as a PDF from the phone.

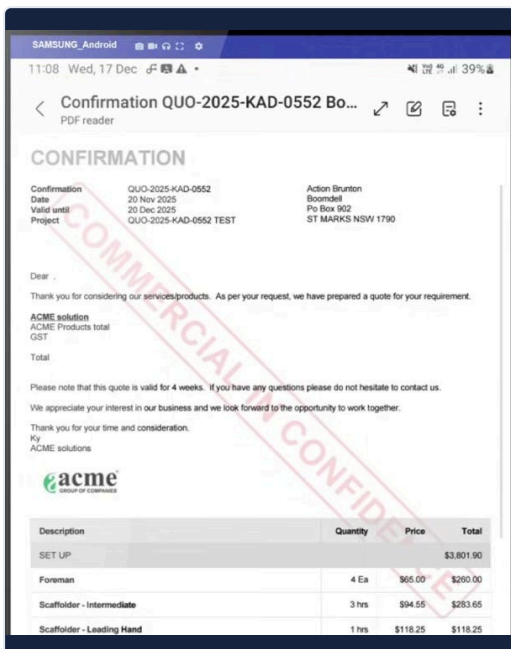


STEP 1 • 00:09 IN THE VIDEO

Review the confirmed quote

The quote shows its total and confirmed status with the line items beneath.

CHAPTER 01 • STEP 1 OF 2



STEP 2 • 00:25 IN THE VIDEO

Export the PDF

The confirmation exports on the client's letterhead with the quote reference, dates, terms and priced line items, ready to send.

CHAPTER 01 • STEP 2 OF 2

Track invoices

The receivables picture, grouped by status.



STEP 1 • 00:38 IN THE VIDEO

Read the invoice statuses

Invoices group as draft, waiting approval, overdue, approved, proforma, not sent to client, not sent to AP, partially paid, paid and rejected.

CHAPTER 02 • STEP 1 OF 2

23 Sept 2025		
2025-KAD-0398	A PLUMBING TRIO	\$1,518.00
2 July 2025		
INV-2025-KAD-0395	A PLUMBING TRIO	\$0.00
11 June 2025		
INV-2025-KAD-0390	Internal Charge-up	\$0.00
20 May 2025		
INV-2025-KAD-0389	No Customer	\$5,500.00
16 Apr 2025		
INV-2025-KAD-0384	ELECTRICAL AUTO ACME	\$965.00
14 Feb 2025		
CUST000045 - KRK Consulting Service	KRK Consulting Service	\$3,969.90
29 Jan 2025		
INV-2025-KAD-0377	ABC TRIPLE	\$739.75
7 Jan 2025		
INV-2024-KAD-0365	ABRASIV DIAMOND	\$0.00
1 Nov 2024		
INV-2024-KAD-0358	Kynection	\$84,252.98
15 Oct 2024		

STEP 2 • 00:49 IN THE VIDEO

Review the ledger

Each invoice lists with its number, customer, date and value, so what is outstanding is clear without opening anything.

CHAPTER 02 • STEP 2 OF 2

Purchase orders

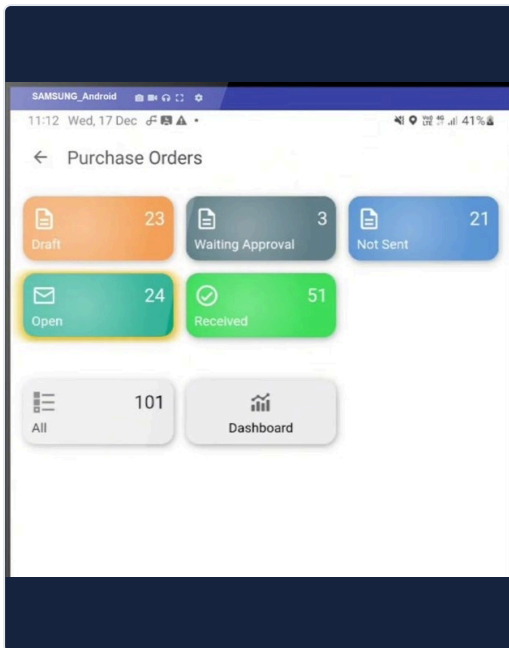
The buying side of the same app.

STEP 1 • 01:02 IN THE VIDEO

Read the orders dashboard

Purchase orders group as draft, waiting approval, not sent, open and received, with a dashboard view alongside.

CHAPTER 03 • STEP 1 OF 2

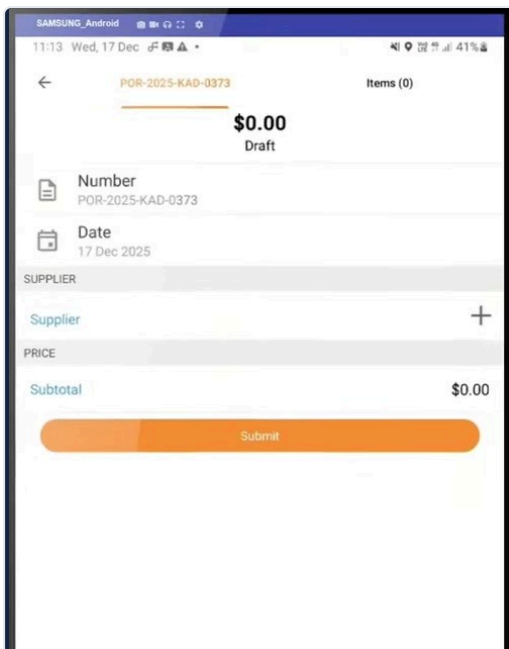


STEP 2 • 01:16 IN THE VIDEO

Create an order

A new order takes its number, date, supplier and price, totalling as items are added, then submits for approval.

CHAPTER 03 • STEP 2 OF 2



Purchase receipts

Recording what actually arrived.



STEP 1 • 01:30 IN THE VIDEO

Record the receipts

Purchase receipts are recorded against the order as goods arrive, grouped by pending and received, so stock and cost stay current from site.

CHAPTER 04 • STEP 1 OF 1

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.

BACK TO Sales Mobile 03

Create quotes with sections and line items

THE REST OF THE SALES MODULE

Ask your Kynnection 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 03

Create quotes with sections and line items