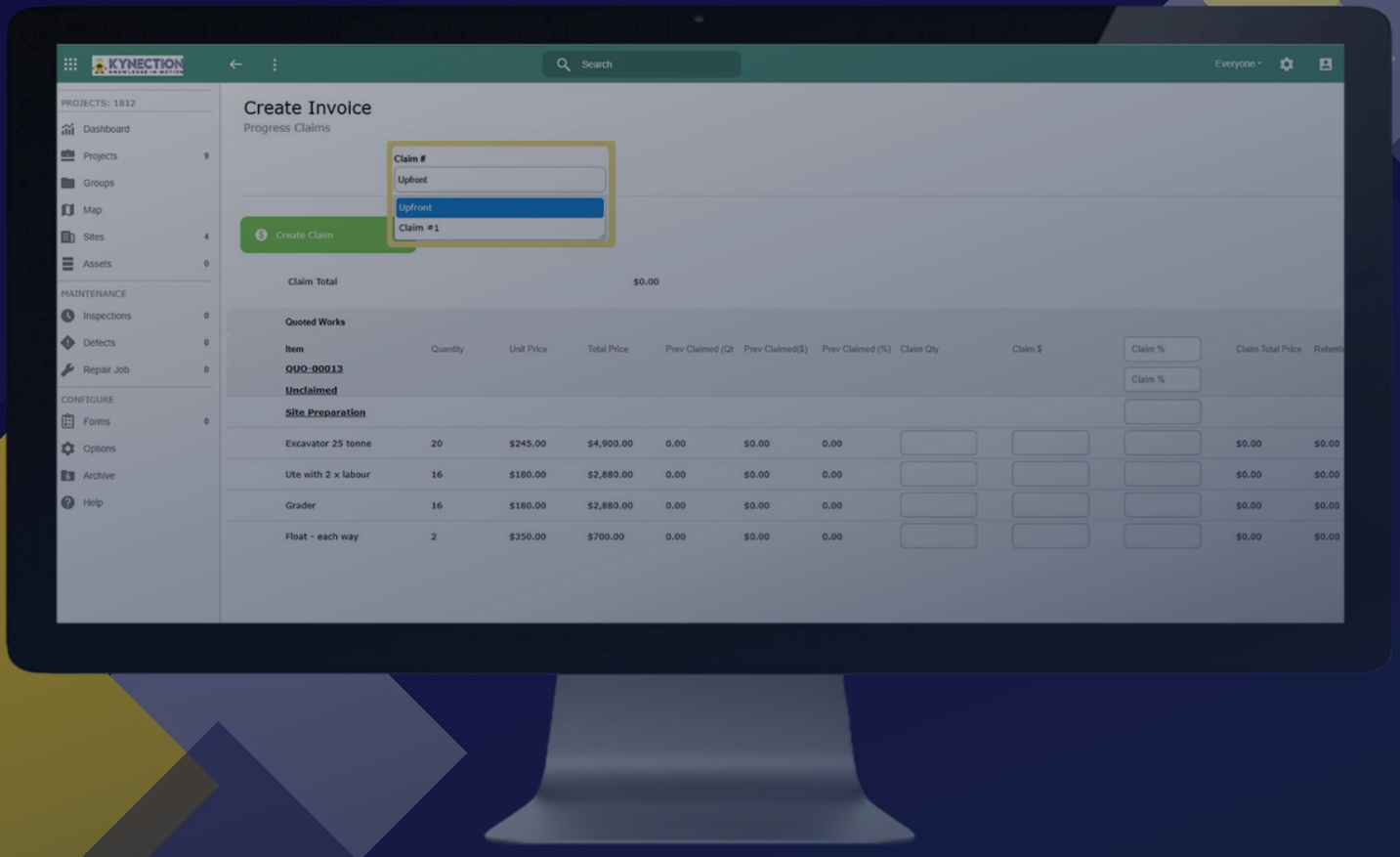




KYNECTION
KNOWLEDGE IN MOTION

MODULE OVERVIEW

KYNECTION · SALES (PROSPER) · SALES MODULE

Master the Sales Module: *Deals, Invoicing and Inventory*

The module overview for Prosper on the web. One pass along the whole commercial chain: a deal becomes a quote, a confirmed quote becomes a project, the project raises progress claims and job invoices, and purchase orders, supplier bills and the catalogue sit behind it all.

12 CHAPTERS

14 MIN 44 SEC

SALES (PROSPER)

WEB USERS · SALES & ACCOUNTS

MODULE OVERVIEW · 14 MIN 44 SEC

What this module overview covers

Twelve chapters follow the money end to end. Chapters 1 to 3 turn a deal into a project. Chapters 4 to 7 cover every way an invoice gets raised and sent. Chapters 8 to 12 cover buying, receiving and the catalogue that prices it.

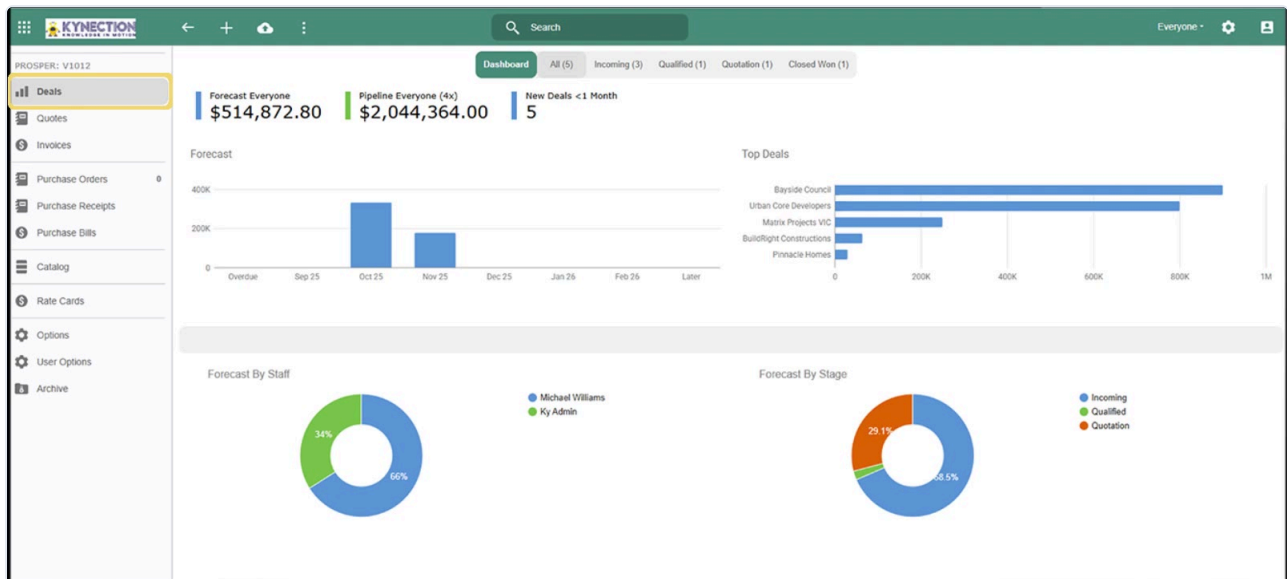
CH 01	Deals and the pipeline	00:00–00:49
CH 02	Build, approve and confirm a quote	00:49–03:01
CH 03	Create a project from a confirmed quote	03:01–03:22
CH 04	Project invoices and progress claims	03:22–05:22
CH 05	Invoice completed jobs	05:22–07:19
CH 06	Batch invoicing	07:19–07:48
CH 07	Edit, finalise and send	07:48–10:10
CH 08	Create and manage purchase orders	10:10–11:13
CH 09	Receive goods	11:13–11:54
CH 10	Process supplier bills	11:54–12:41
CH 11	Set up catalogue items	12:41–13:31
CH 12	Manage rate cards	13:31–14:44

- **The chain matters.** A quote confirmed against a deal becomes a project, and the project is what progress claims and job invoices are raised against. Skipping a link breaks the reporting downstream.
- **Two ways to invoice.** Progress claims bill a project by quantity or percentage as work proceeds. Job invoicing bills completed jobs, and can be batched across several at once.
- **Rate cards decide price.** Customer rate cards override catalogue pricing per client, and supplier rate cards do the same on the buying side.

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.

Deals and the pipeline

The deals dashboard is the forecast: what is open, what is weighted, and who owns it.



STEP 1 • 00:15 IN THE VIDEO

Read the deals dashboard

The dashboard shows total and weighted pipeline value with the top deals ranked, plus forecast donuts split by staff and by stage.

CHAPTER 01 • STEP 1 OF 2

The screenshot shows the KYNECTION New Deal form. The form is titled "New Deal" and contains the following fields:

- Name:** Melbourne Water Stormwater Maintenance
- Company:** (empty field)
- Contact:** (empty field)
- Amount:** (empty field)
- Currency:** Australian Dollar
- Closing Date:** 01/10/2025
- Owner:** Ky Admin

At the bottom of the form are two buttons: "Save" and "Edit Details".

STEP 2 • 00:35 IN THE VIDEO

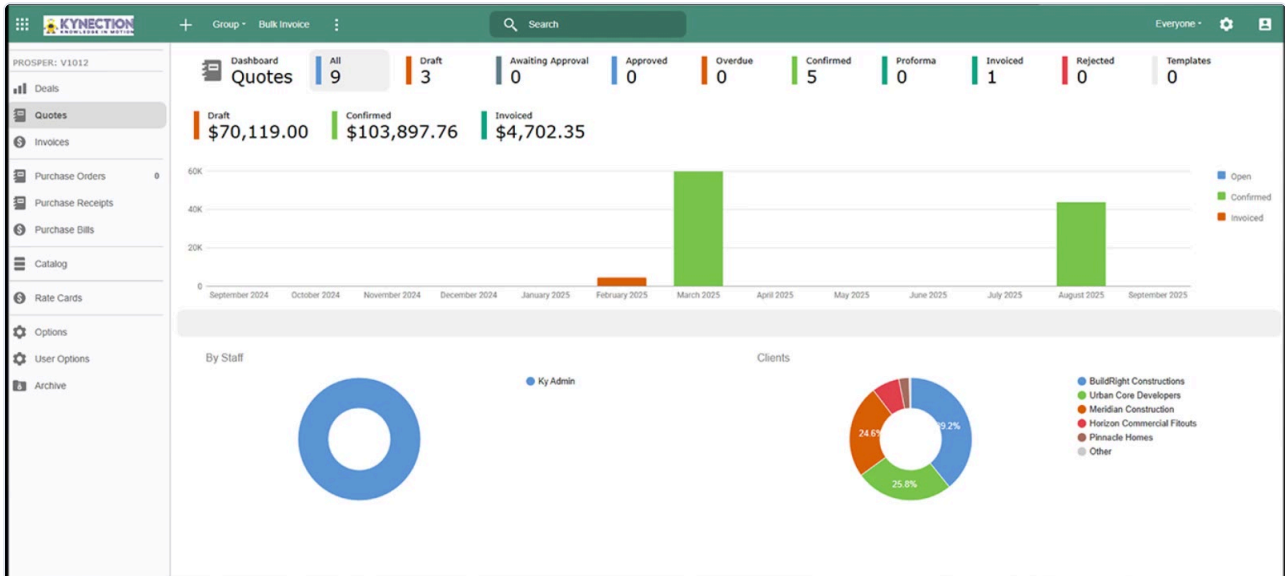
Create a deal

A new deal takes a name, company, contact, expected value and owner. **Save** records it, or **Full Details** opens the complete record.

CHAPTER 01 • STEP 2 OF 2

Build, approve and confirm a quote

The longest stage in the module. A quote is built from sections and line items, then routed for approval.



STEP 1 • 01:05 IN THE VIDEO

Read the quotes dashboard

Quotes are counted by status: draft, awaiting approval, approved, confirmed, rejected and cancelled, with the value of each band shown above.

CHAPTER 02 • STEP 1 OF 4

The screenshot shows the KYNECTION Quote form. The form has tabs for Quote, Price, and Address. The Quote tab is active. The form fields include: Number (QUO-00013), Date (29/09/2025), GST % (10), Valid until (29/10/2025), Owner (Ky Admin), Type (Standard), and a Replace Description with Template checkbox. Below the form is a rich text editor for the Description, with a toolbar containing bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and other icons. The form also includes sections for Client and Project.

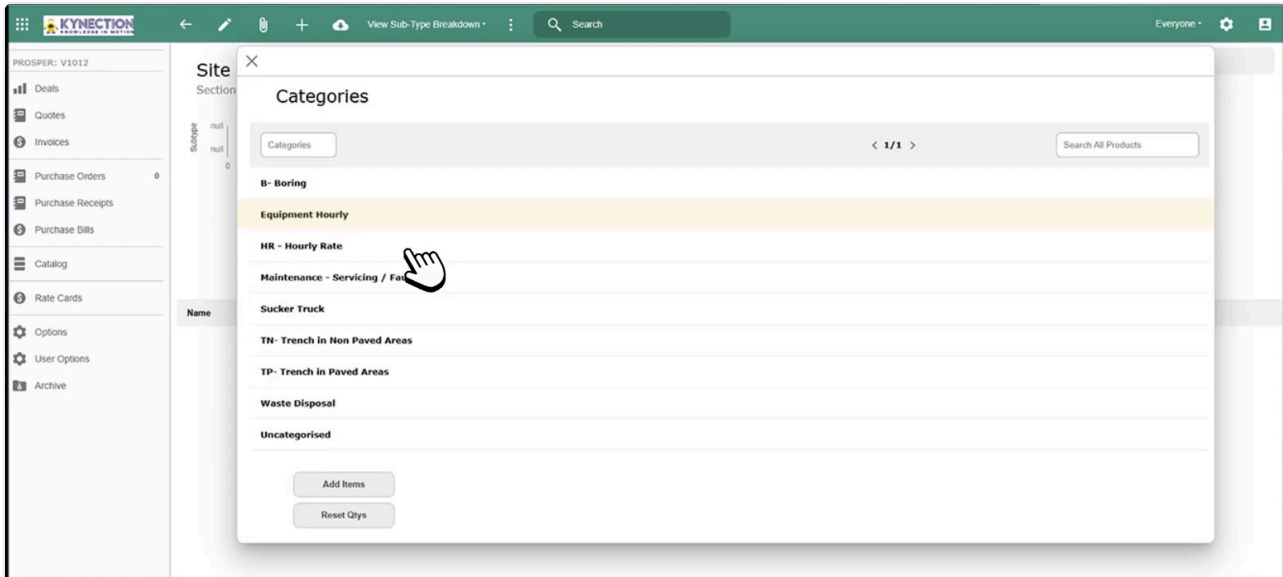
STEP 2 • 01:40 IN THE VIDEO

Start the quote

A new quote takes a number, date, valid-until, GST percentage, type and owner, and can pull a description from a template. Client and project are set at the bottom.

CHAPTER 02 • STEP 2 OF 4

Build, approve and confirm a quote

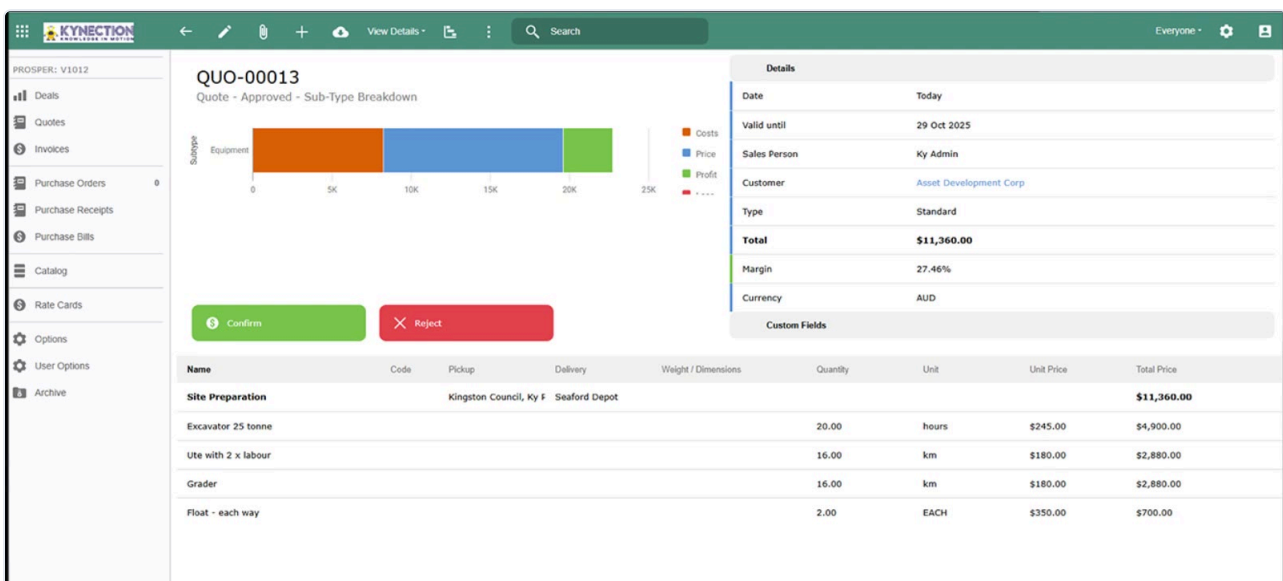


STEP 3 • 02:20 IN THE VIDEO

Pick the line items

Line items are chosen from the catalogue by category, so a quote is built from priced items rather than free text.

CHAPTER 02 • STEP 3 OF 4



STEP 4 • 02:50 IN THE VIDEO

Submit and confirm

Submitting sends the quote for approval, where it can be approved or rejected. Confirming it is what releases the next step.

CHAPTER 02 • STEP 4 OF 4

Create a project from a confirmed quote

Confirmation turns the quote into a project without re-keying anything.

PROSPER: V1012

Deals

Quotes

Invoices

Purchase Orders 0

Purchase Receipts

Purchase Bills

Catalog

Rate Cards

Options

User Options

Archive

QUO-00013

New Project

Name QUO-00013

Template

Owner Ky Admin

Start Date 29/09/2025

Due Date 29/10/2025

☒ Include Quote Items

Save

Create Project

Currency AUD

Custom Fields

Name	Code	Pickup	Delivery	Weight / Dimensions	Quantity	Unit	Unit Price	Total Price
Site Preparation		Kingston Council, Ky F	Seaford Depot					\$11,360.00
Excavator 25 tonne					20.00	hours	\$245.00	\$4,900.00
Ute with 2 x labour					16.00	km	\$180.00	\$2,880.00
Grader					16.00	km	\$180.00	\$2,880.00
Float - each way					2.00	EACH	\$350.00	\$700.00

STEP 1 • 03:10 IN THE VIDEO

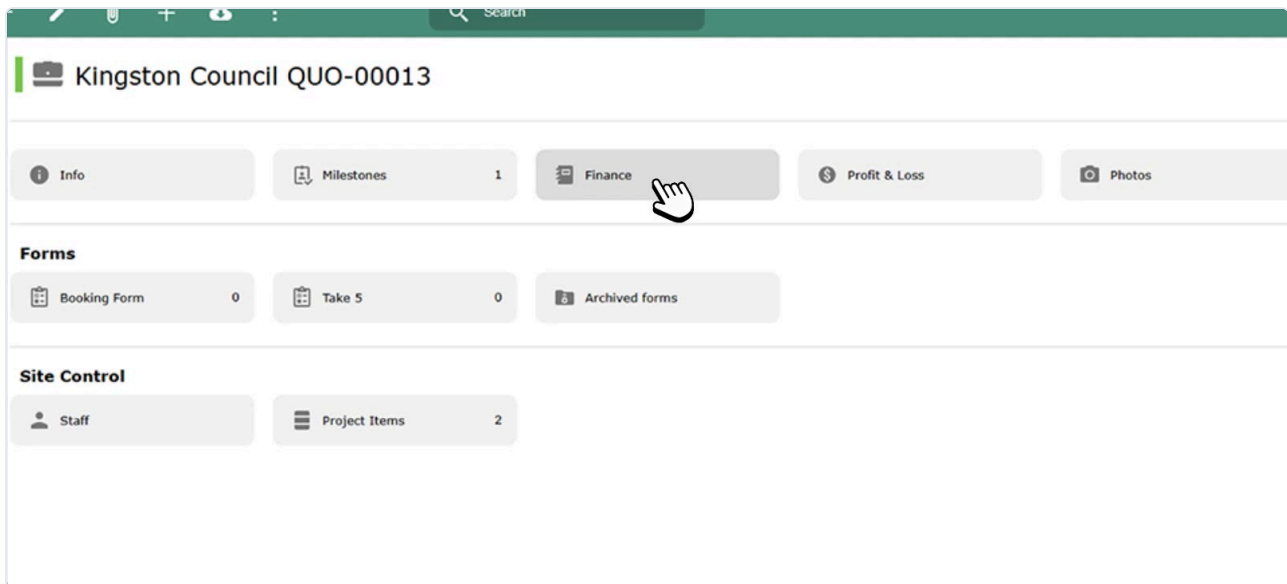
Raise the project

From the confirmed quote, create the project with its name, start and end dates and currency. The quote's value and line items carry across.

CHAPTER 03 • STEP 1 OF 1

Project invoices and progress claims

Progress claims bill a project as the work proceeds, by quantity or by percentage.

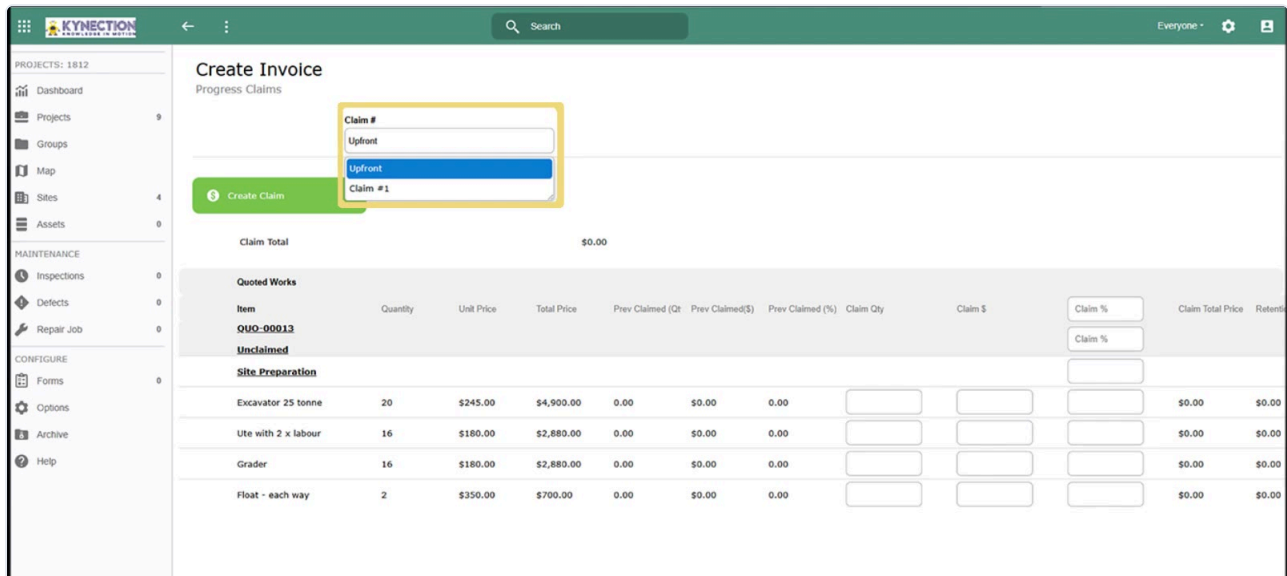


STEP 1 • 03:40 IN THE VIDEO

Open the project finance tab

The project carries Info, Milestones, **Finance**, Profit & Loss and Photos tabs, with forms and site control beneath.

CHAPTER 04 • STEP 1 OF 4



STEP 2 • 04:15 IN THE VIDEO

Claim by quantity

The claim screen shows previously claimed quantity and value against this claim's quantity and value, so the running total is always visible.

CHAPTER 04 • STEP 2 OF 4

Project invoices and progress claims

Create Invoice
Progress Claims

Claim #
Upfront

Create Claim

Claim Total
\$2,840.00

Item	Quantity	Unit Price	Total Price	Prev Claimed (Qt)	Prev Claimed (\$)	Prev Claimed (%)	Claim Qty	Claim \$	Claim Total Price
QUO-00013									
Unclaimed									
Site Preparation									
Excavator 25 tonne	20	\$245.00	\$4,900.00	0.00	\$0.00	0.00	25		\$1,225.00
Ute with 2 x labour	16	\$180.00	\$2,880.00	0.00	\$0.00	0.00	25		\$720.00
Grader	16	\$180.00	\$2,880.00	0.00	\$0.00	0.00	25		\$720.00
Float - each way	2	\$350.00	\$700.00	0.00	\$0.00	0.00	25		\$175.00

STEP 3 • 04:53 IN THE VIDEO

Claim by percentage

A claim can be entered as a percentage of the line rather than a quantity, which suits lump-sum items.

CHAPTER 04 • STEP 3 OF 4

INV-00019
Invoice - Draft - Sub-Type Breakdown

100% Equipment

Submit

Name	Code	Sub-Type	Quantity	Unit	Unit Price	Subtotal	GST	Total GST	Total Price
Site Preparation						\$2,040.00		\$204.00	\$3,124.00
Excavator 25 tonne		Equipment	20.00	hours	\$61.25	\$1,225.00	10%	\$122.50	\$1,347.50
Ute with 2 x labour		Equipment	16.00	km	\$45.00	\$720.00	10%	\$72.00	\$792.00
Grader		Equipment	16.00	km	\$45.00	\$720.00	10%	\$72.00	\$792.00
Float - each way		Equipment	2.00	EACH	\$87.50	\$175.00	10%	\$17.50	\$192.50

STEP 4 • 05:15 IN THE VIDEO

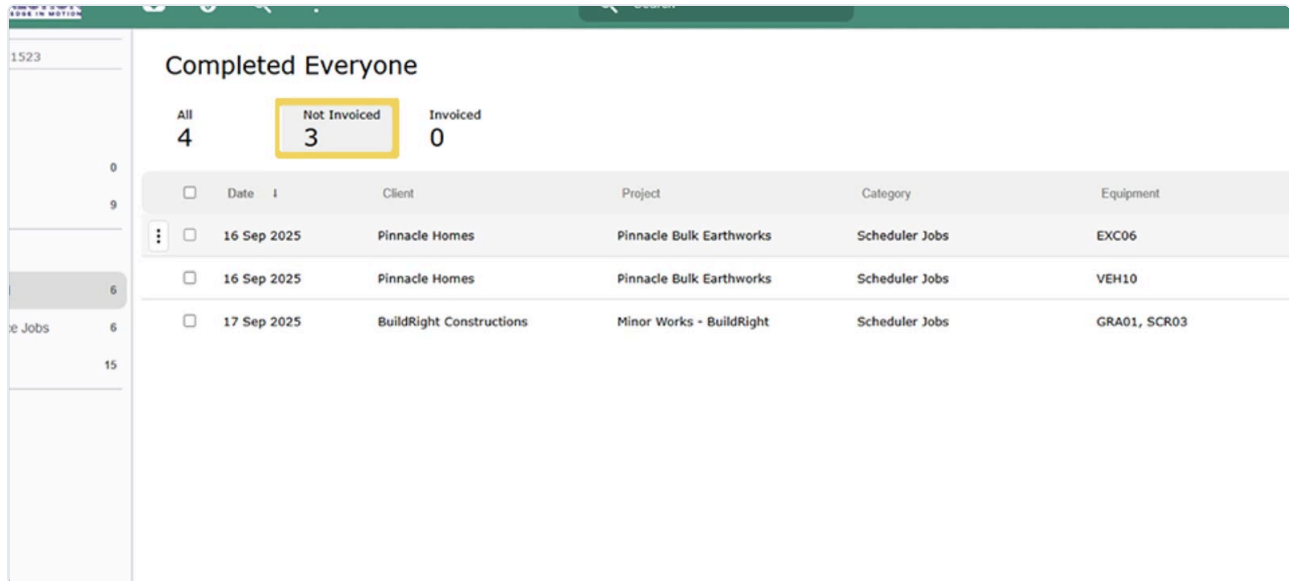
Finalise the invoice

The draft invoice shows its details and total, ready to submit.

CHAPTER 04 • STEP 4 OF 4

Invoice completed jobs

The other route to an invoice: bill jobs once they are complete.



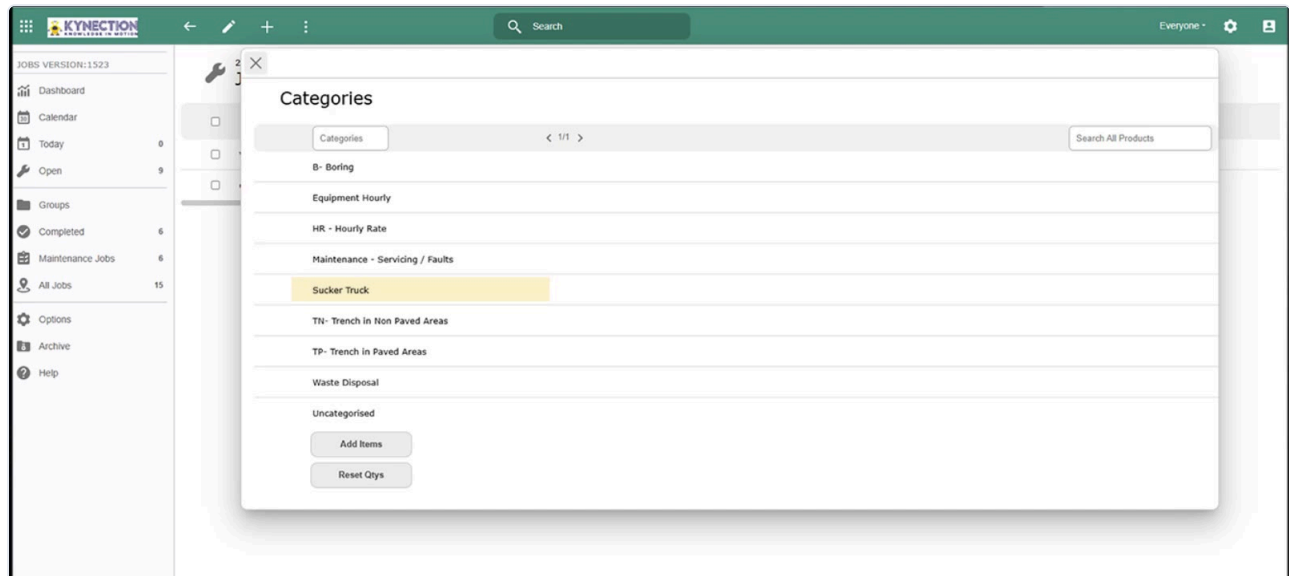
Completed Everyone					
All	Not Invoiced	Invoiced			
4	3	0			
☐	Date	Client	Project	Category	Equipment
☐	16 Sep 2025	Pinnacle Homes	Pinnacle Bulk Earthworks	Scheduler Jobs	EXC06
☐	16 Sep 2025	Pinnacle Homes	Pinnacle Bulk Earthworks	Scheduler Jobs	VEH10
☐	17 Sep 2025	BuildRight Constructions	Minor Works - BuildRight	Scheduler Jobs	GRA01, SCR03

STEP 1 • 05:40 IN THE VIDEO

Find the completed jobs

The jobs list filtered to completed work is the starting point for job invoicing.

CHAPTER 05 • STEP 1 OF 3



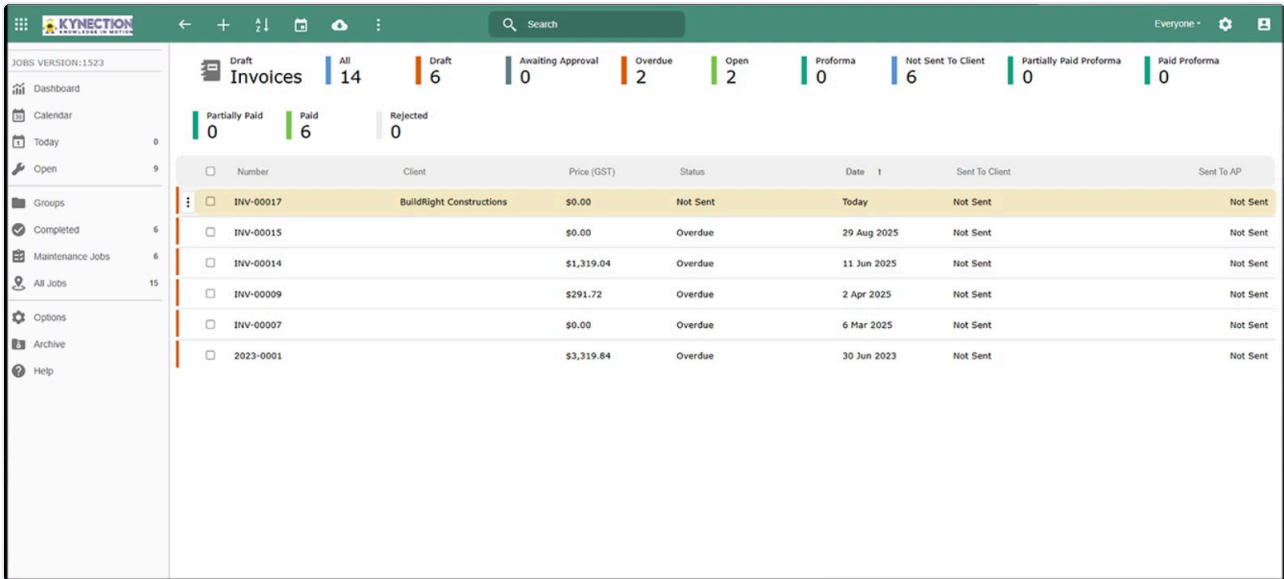
STEP 2 • 06:20 IN THE VIDEO

Categorise the job items

Job items are picked from the catalogue by category, so the invoice lines carry the right codes and pricing.

CHAPTER 05 • STEP 2 OF 3

Invoice completed jobs



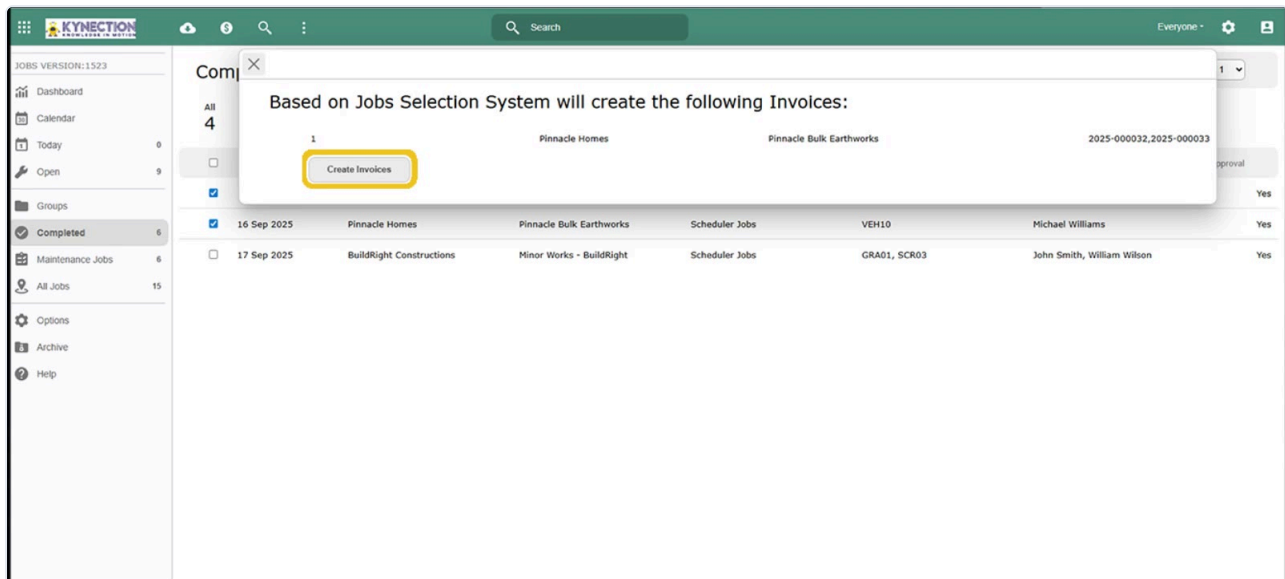
STEP 3 • 07:00 IN THE VIDEO

Read the invoices dashboard

The invoices dashboard counts and values invoices by status: draft, awaiting approval, open and received, with the ledger beneath.

Batch invoicing

Several completed jobs can be invoiced in one action rather than one at a time.



STEP 1 • 07:30 IN THE VIDEO

Select and batch

Select the completed jobs to bill and create the invoices together. This is the difference between an afternoon and a few minutes at month end.

CHAPTER 06 • STEP 1 OF 1

Edit, finalise and send

A draft invoice can be restructured before it goes out, then emailed straight from the system.

INV-00020
Invoice - Not Sent - Sub-Type Breakdown

Equipment 100%

[Submit](#)

Name	Code	Sub-Type	Quantity	Unit	Unit Price	Subtotal	GST	Total GST	Total Price
2025-000032						\$700.00		\$70.00	\$770.00
Excavator 20 tonne		Equipment	16.00	hours	0.00	0.00	10%	0.00	0.00
Float - each way		Equipment	2.00	EACH	350.00	700.00	10%	70.00	770.00
2025-000033						\$0.00		\$0.00	\$0.00
Ute with 2 x labour		Equipment	10.00	km	0.00	0.00	10%	0.00	0.00

Details < 2 of 7 >

Date: Today
Valid until: 29 Oct 2025
Sales Person: Ky Admin
Customer: Pinnacle Homes
Project: Pinnacle Bulk Earthworks
Job: 2025-000032, 2025-000033
Total: \$770.00
Currency: AUD

Custom Fields

STEP 1 • 08:10 IN THE VIDEO

Edit the draft

Line items can be edited, described and re-priced. Sections and descriptions are customisable so the invoice reads the way the client expects.

CHAPTER 07 • STEP 1 OF 4

PROSPER: V1012 Edit Non-Stock Subitems < 1 of 2 >

Name: Excavator 20 tonne - Change name | Code: |
Sales Account Code: Sales | Division: |
Quantity: 16

Price Details

Base Price: **230.00**
Labour - Billable: 0.00
Labour - Non-Billable: 0.00
Total: 0.00

Core Unit: hours | Sales Tax %: 10
Discount %: 0 | Commission %: 0

Description: Excavator description details

STEP 2 • 08:50 IN THE VIDEO

Submit and finalise

Submitting moves the invoice out of draft and locks it for sending.

CHAPTER 07 • STEP 2 OF 4

Edit, finalise and send

INV-00020
Invoice - Open - Sub-Type

Equipment

Mark as Paid

Name	Code	Sub-Type	Quantity	Unit	Unit Price	Subtotal	GST	Total GST	Total Price
Change section nam						\$700.00		\$70.00	\$770.00
Excavator 20 tonne - t		Equipment	16.00	hours	0.00	0.00	10%	0.00	0.00
Float - each way		Equipment	2.00	EACH	350.00	700.00	10%	70.00	770.00
2025-000033						\$0.00		\$0.00	\$0.00
Ute with 2 x labour		Equipment	10.00	km	0.00	0.00	10%	0.00	0.00

STEP 3 • 09:30 IN THE VIDEO

Email it to the client

The invoice can be emailed directly, or downloaded and previewed as a PDF first.

CHAPTER 07 • STEP 3 OF 4

INV-00020
Invoice - Open - Sub-Type Breakdown

Equipment

100%

Mark as Paid

Send to Client

Name	Code	Sub-Type	Quantity	Unit	Unit Price	Subtotal	GST
Change section nam						\$700.00	

STEP 4 • 10:00 IN THE VIDEO

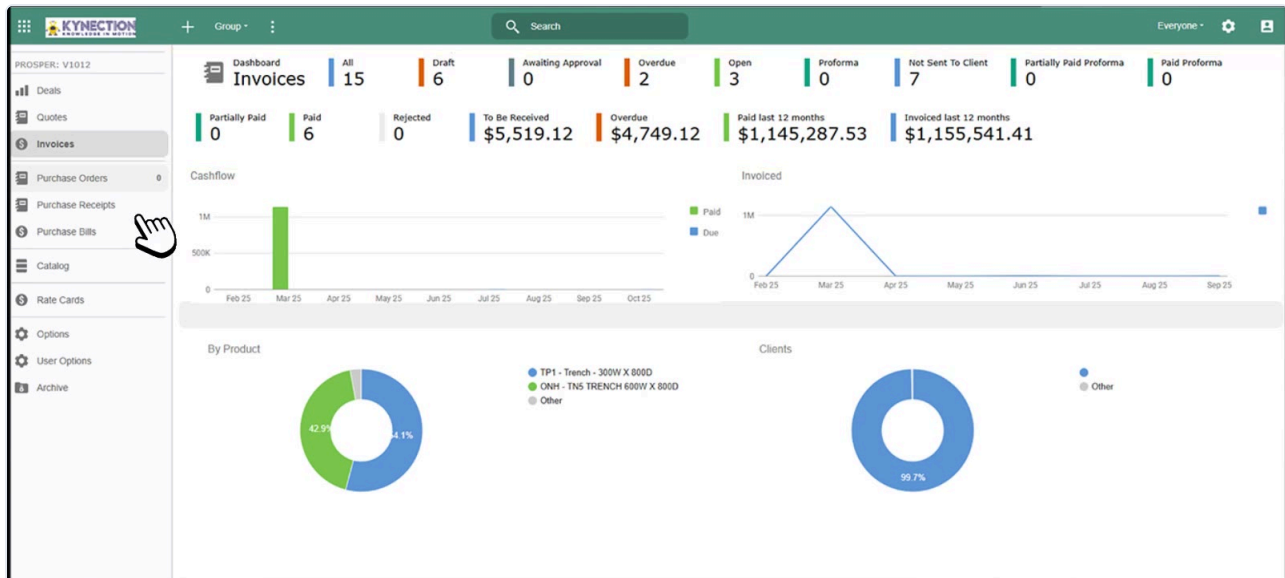
Mark it paid

Mark as Paid closes the loop, and the invoices dashboard tracks draft, awaiting, open and received across the whole ledger.

CHAPTER 07 • STEP 4 OF 4

Create and manage purchase orders

The buying side mirrors the selling side: a dashboard by status, then an order built from the catalogue.



STEP 1 · 10:22 IN THE VIDEO

Track invoices through to paid

The dashboard tracks the whole ledger by status with its trend charts, which is the receivables picture at a glance.

CHAPTER 08 · STEP 1 OF 2

The screenshot shows the KYNECTION Purchase Order form. The form has a top navigation bar with tabs for Purchase Order, Price, and Address. The main form area contains several input fields: Number (POR-00007), Date (30/09/2025), GST % (10), Valid until, Owner (Ky Admin), Replace Description with Template, Disable Receipting, and Disable Stock Receipting. Below these fields is a rich text editor for the Description, with a toolbar containing bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and other icons. The form also includes a Supplier field and a Project field.

STEP 2 · 10:55 IN THE VIDEO

Build the order

A new order takes a number, date, valid-until, GST, owner and supplier. Items come **From Supplier**, **From Product List** or as a **Once off Item**.

CHAPTER 08 · STEP 2 OF 2

Receive goods

Receiving can be full or partial, so a part delivery does not close the order.

Add Items

Search
Everyone

PROSPER: V1012

- Deals
- Quotes
- Invoices
- Purchase Orders
- Purchase Receipts
- Purchase Bills
- Catalog
- Rate Cards
- Options
- User Options
- Archive

POR-00006

V7- Temporary Fencing

> Confirm Partial
> Cancel

Name	Code	Division	Received	Quantity	Unit	Unit Cost	GST	Subtotal	
V7- Temporary Fencing	V7		0%	50		100	10	\$5,000.00	
								SUBTOTAL	\$5,000.00
								GST 10%	\$500.00
								Total	\$5,500.00

Details

Date: 29 Sep 2025

Owner: Ky Admin

Supplier: Apex Electrical Services

Project: Minor Works - BuildRight

Job: 2025-000036

Currency: AUD

Custom Fields

STEP 1 • 11:33 IN THE VIDEO

Record what arrived

Each line carries a received quantity and a received date, so a partial delivery is recorded accurately and the balance stays open.

CHAPTER 09 • STEP 1 OF 2

KYNECTION
PROSPER IN MOTION
Add Items

Search
Everyone

PROSPER: V1012
[Details](#)
[Quotes](#)
[Invoices](#)
[Purchase Orders](#) 0
[Purchase Receipts](#)
[Purchase Bills](#)
[Catalog](#)
[Rate Cards](#)
[Options](#)
[User Options](#)
[Archive](#)

POR-00008

100%

V7-Temporary Fencing

> Receive All
> Partial Receive

Name	Code	Division	Received	Quantity	Unit	Unit Cost	GST	Subtotal
V7- Temporary Fencing			0	2		100	19	\$200.00
V7- Temporary Fencing - I	V7							
							SUBTOTAL	\$200.00
							GST 10%	\$20.00
							Total	\$220.00

Details

Date	Today
Owner	Ky Admin
Supplier	Apex Electrical Services
Currency	AUD

Custom Fields

STEP 2 • 11:45 IN THE VIDEO

Close or keep it open

Fully received lines close out. Anything outstanding remains on the order until the rest arrives.

CHAPTER 09 • STEP 2 OF 2

Process supplier bills

The bill is matched to the order it came from, which is what makes the reconciliation work.

STEP 1 • 12:05 IN THE VIDEO

Create the bill

From the purchase bills dashboard, create a bill and select the supplier.

CHAPTER 10 • STEP 1 OF 2

Name	Code	Division	Order #	Project	Quantity	Unit	Unit Cost	GST	Subtotal
V7- Temporary Fend	V7		POR-00008		2		\$100.00	10	\$200.00
SUBTOTAL									\$200.00
GST 10%									\$20.00
Total									\$220.00

STEP 2 • 12:30 IN THE VIDEO

Link it to the order

Items can be pulled **From Existing Order**, from a project, or added as products, non-stock or once-off items. Finalising the bill posts it.

CHAPTER 10 • STEP 2 OF 2

Set up catalogue items

The catalogue is what everything else prices from: stock, non-stock and labour.

PROSPER: V1012

Edit Stock Subitems

Name

Code

Barcode

Sales Account Code

Purchase Account Code

Category

Type

Subtype

Manufacturer

Owner

Terms

☐ Package

Price Details	Cost	Sale
Base	0.00	0.00
Overhead	0.00	
Labour - Billable	\$0.00	\$0.00
Labour - Non-Billable	\$0.00	\$0.00

STEP 1 • 12:55 IN THE VIDEO

Open a catalogue item

A catalogue item carries its name, code, sales and purchase account codes, category, subtype, type, manufacturer and owner.

CHAPTER 11 • STEP 1 OF 2

0

Edit Stock Subitems

☐ Package

Price Details	Cost	Sale
Base	0.00	0.00
Overhead	0.00	
Labour - Billable	\$0.00	\$0.00
Labour - Non-Billable	\$0.00	\$0.00
Markup %		0.00
Margin %		0.00
Total	\$0.00	\$0.00

Wholesale Price

Sales Tax %

Discount %

Core Unit

Currency

Commission %

STEP 2 • 13:20 IN THE VIDEO

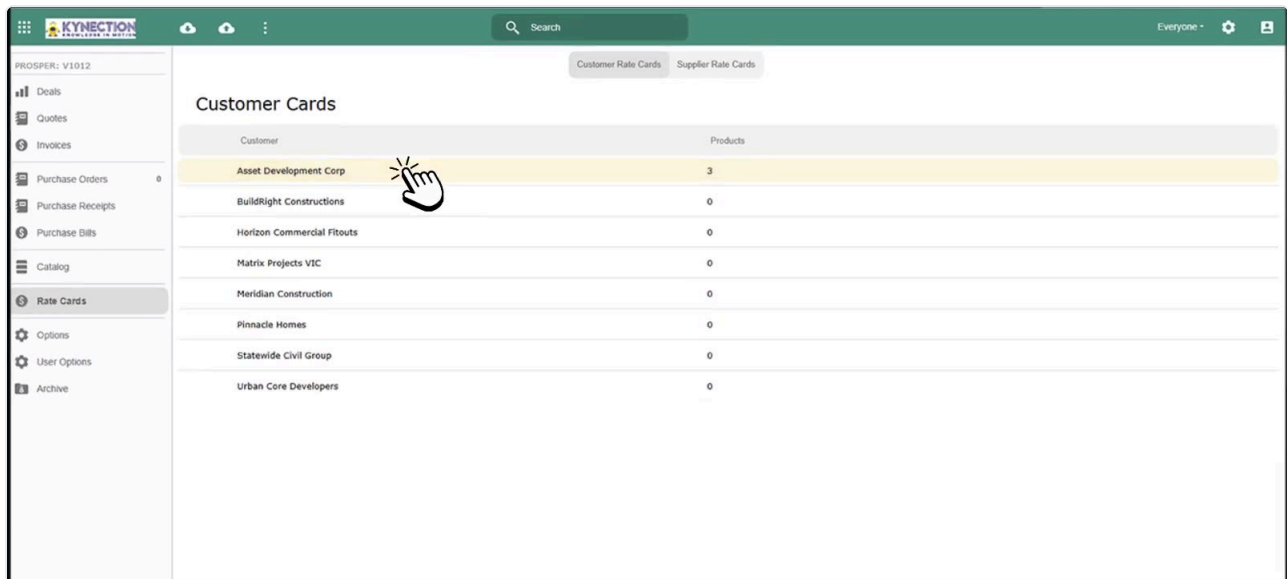
Add an item

A new item takes a name, code, sales and purchase account codes, category, subtype, type, manufacturer and owner. Labour can be added as a sub-item beneath a product.

CHAPTER 11 • STEP 2 OF 2

Manage rate cards

Rate cards override catalogue pricing for a specific customer or supplier.

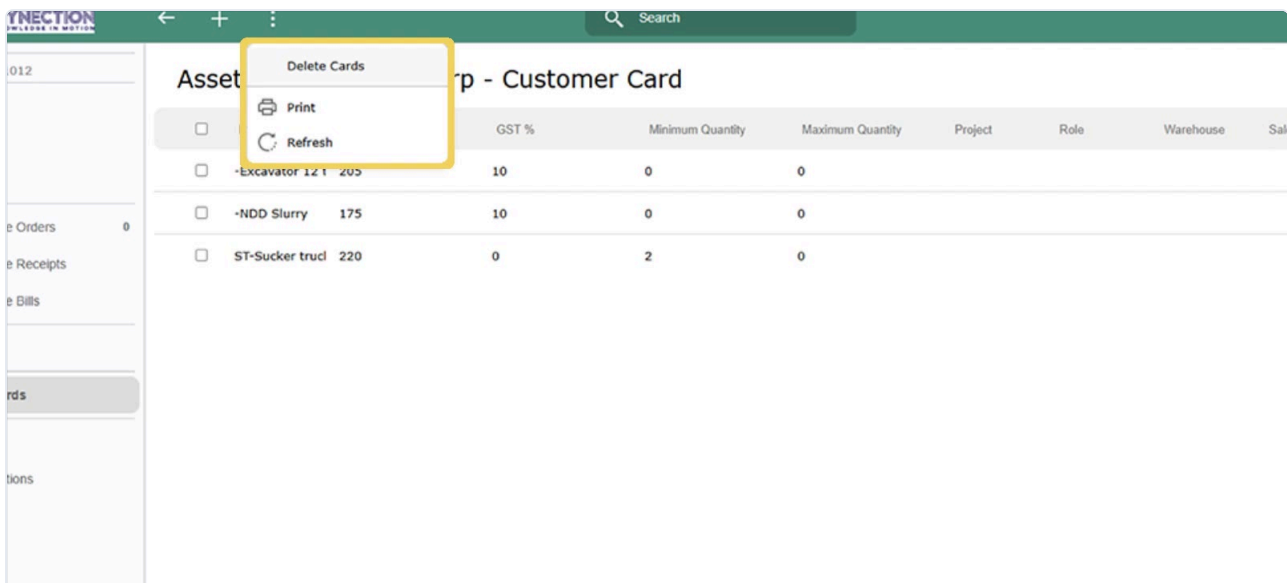


STEP 1 • 13:42 IN THE VIDEO

Open the customer cards

Each customer can hold its own rate card, so agreed pricing applies automatically rather than being remembered.

CHAPTER 12 • STEP 1 OF 3



STEP 2 • 14:15 IN THE VIDEO

Set rates and minimums

A card sets unit price, sale unit and a minimum invoice quantity per item, with a costing reference. Rates can be bulk imported rather than typed.

CHAPTER 12 • STEP 2 OF 3

Manage rate cards

V2 Concrete/Rock Breaking Supplier Card

Supplier Item Code: Purchase Price:

GST %: Minimum Order Quantity:

Amount: Currency:

Project: Role:

Reference	Catalog Value	Supplier Card Value
Name	V2 Concrete/Rock Breaking	
Code	V2	
Purchase Price	\$0.00	\$150.00
GST (%)	0	0
GST (\$)	\$0.00	\$0.00
Final Price	\$0.00	\$150.00

STEP 3 • 14:35 IN THE VIDEO

Manage supplier cards

Supplier rate cards work the same way on the buying side, carrying purchase price, GST and total against each item.

CHAPTER 12 • STEP 3 OF 3