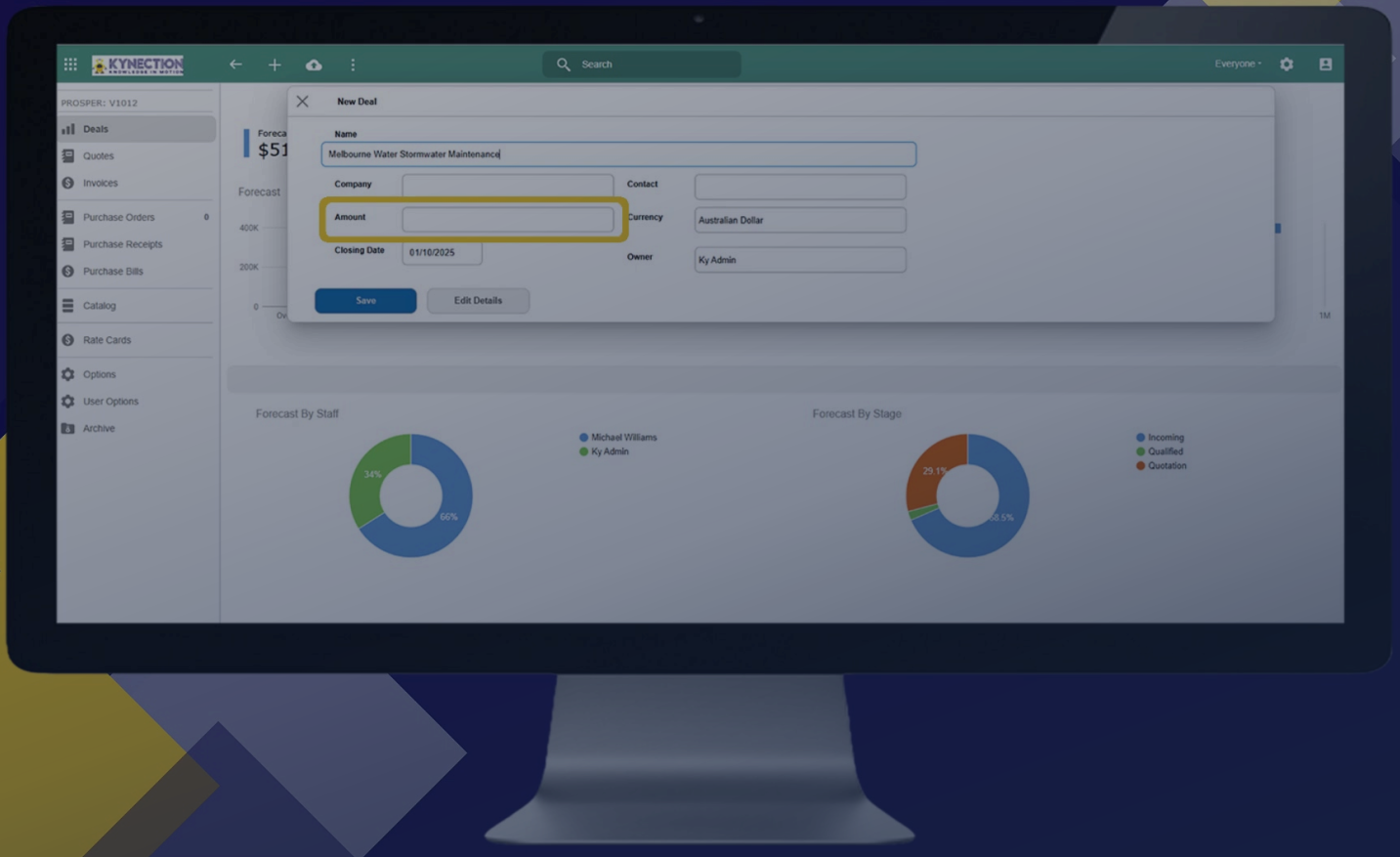




KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION • SALES (PROSPER) • PART 2 OF THE SALES MODULE

Deals, Quotes and *Creating a Project*

The front of the pipeline: reading the deals dashboard, raising a deal, building a quote from sections and line items, getting it approved, and turning the confirmed quote into a live project.

4 CHAPTERS

3 MIN 30 SEC

SALES (PROSPER)

WEB USERS • SALES

FEATURE GUIDE • 3 MIN 30 SEC

What this feature covers

Four stages, eight steps: the deals dashboard, creating a deal, building and approving a quote, and creating the project.

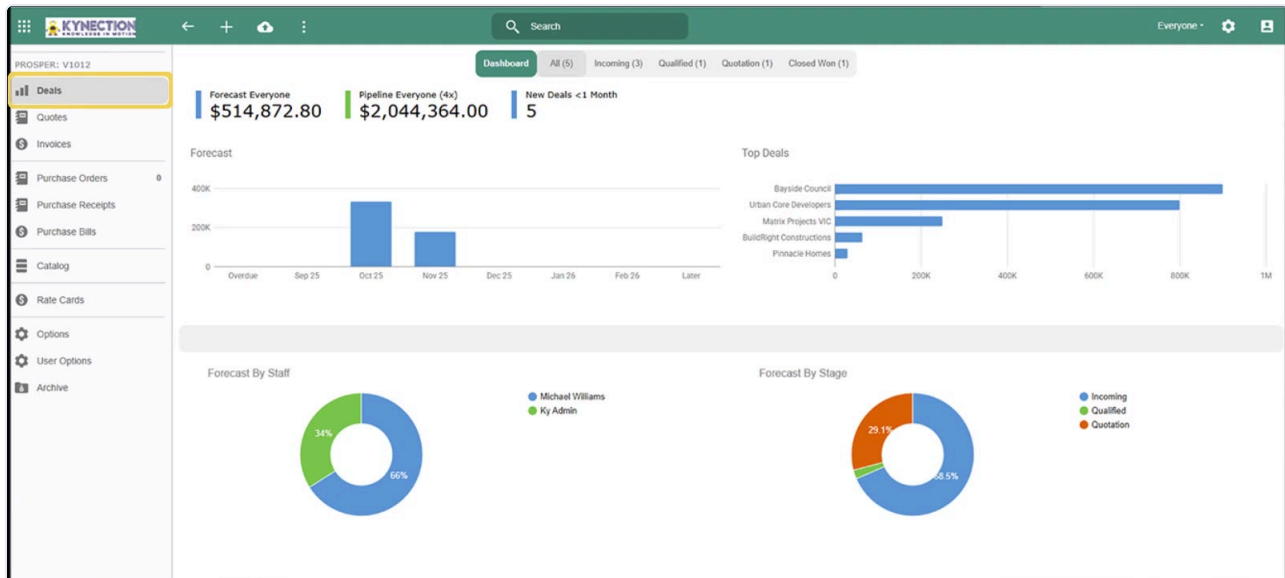
CH 01	Work the deals dashboard The dashboard is the forecast, split by staff and by stage.	00:00–01:01
CH 02	Start a quote Quotes have their own dashboard, counted and valued by status.	01:01–01:39
CH 03	Add sections and line items A quote is built from sections, each holding its own lines.	01:39–02:49
CH 04	Approve and create the project Approval and confirmation are separate steps, and only confirmation releases the project.	02:49–03:30

- **Confirmation is the trigger.** A quote has to be confirmed before it can become a project. Approved is not the same as confirmed.
- **Reuse previous work.** Sections and lines can be imported from an existing quote rather than rebuilt, which is where most of the time goes on a large quote.
- **Weighted against total.** The deals dashboard shows both, so the forecast reflects probability rather than wishful thinking.

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.

Work the deals dashboard

The dashboard is the forecast, split by staff and by stage.



STEP 1 • 00:18 IN THE VIDEO

Read the pipeline

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

CHAPTER 01 • STEP 1 OF 2

The **New Deal** form is displayed over the dashboard. The form fields are:

- Name:** Melbourne Water Stormwater Maintenance
- Company:** [Empty]
- Contact:** [Empty]
- Amount:** [Empty]
- Currency:** Australian Dollar
- Closing Date:** 01/10/2025
- Owner:** Ky Admin

Buttons: Save, Edit Details

STEP 2 • 00:45 IN THE VIDEO

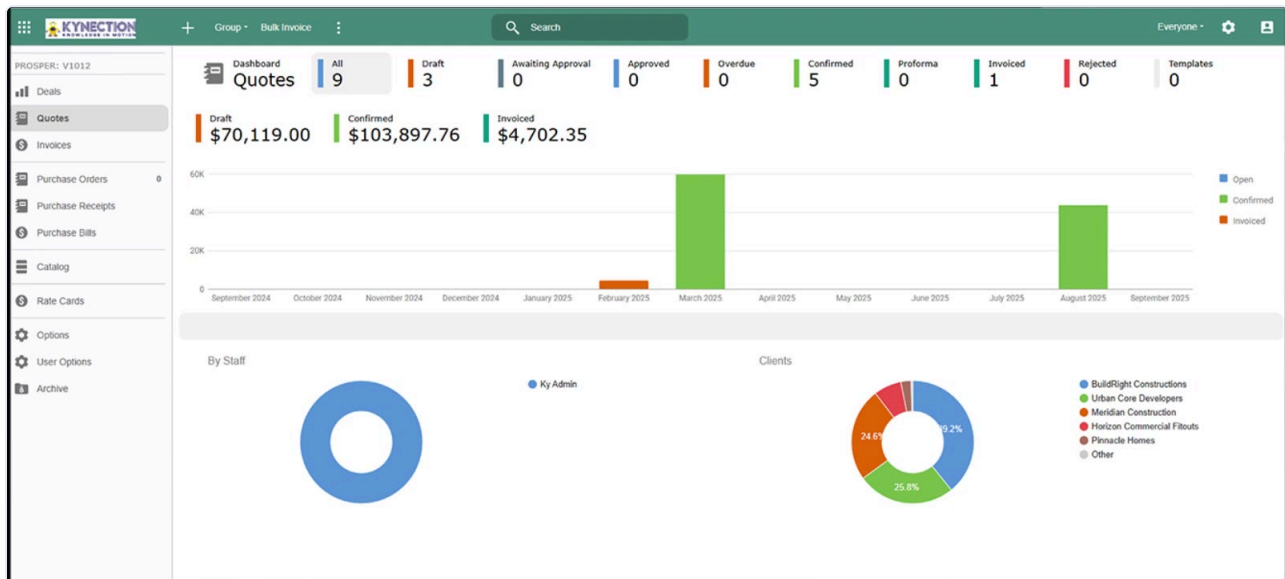
Create a deal

A new deal takes a name, company, contact, expected value and owner. Save it, or open full details to complete the record.

CHAPTER 01 • STEP 2 OF 2

Start a quote

Quotes have their own dashboard, counted and valued by status.



STEP 1 • 01:07 IN THE VIDEO

Read the quotes dashboard

Quotes are grouped as draft, awaiting approval, approved, confirmed, rejected and cancelled, with the value of each band above the counts.

CHAPTER 02 • STEP 1 OF 2

The screenshot shows the KYNECTION Quote form. The form has tabs for 'Quote', 'Price', and 'Address'. The 'Quote' tab is active. The form fields are: Number (QUO-00013), Date (29/09/2025), GST % (10), Valid until (29/10/2025), Owner (Ky Admin), Type (Standard), and Replace Description with Template (a text area). Below the form is a large yellow bar. At the bottom, there are tabs for 'Client', 'Customer', and 'Project'.

STEP 2 • 01:26 IN THE VIDEO

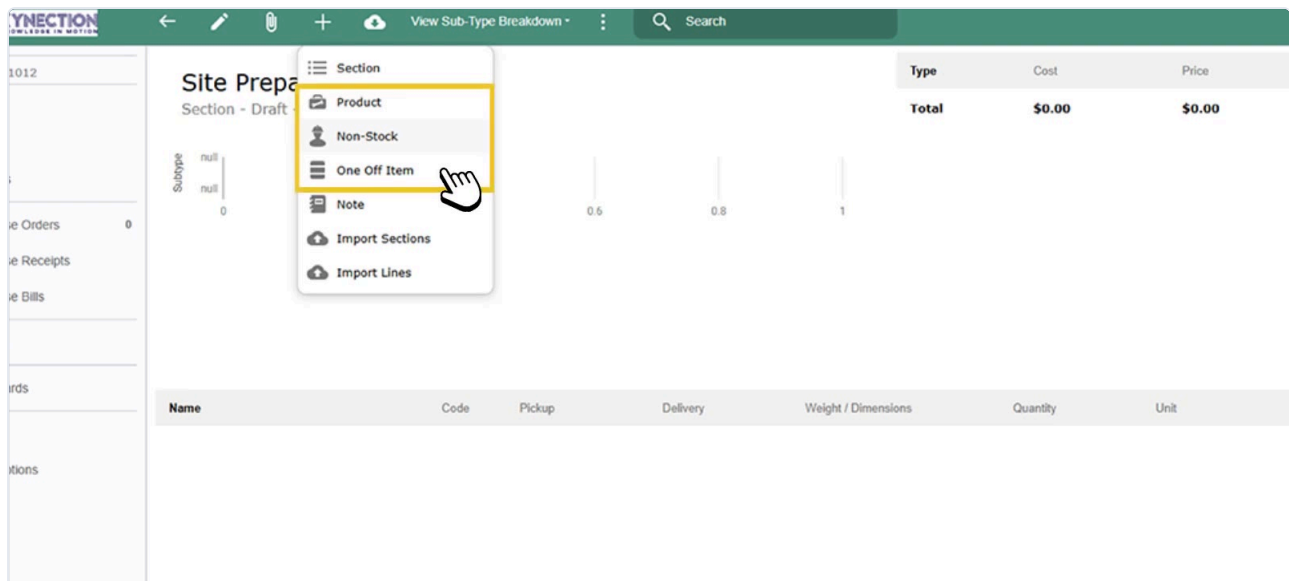
Open a new quote

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

CHAPTER 02 • STEP 2 OF 2

Add sections and line items

A quote is built from sections, each holding its own lines.

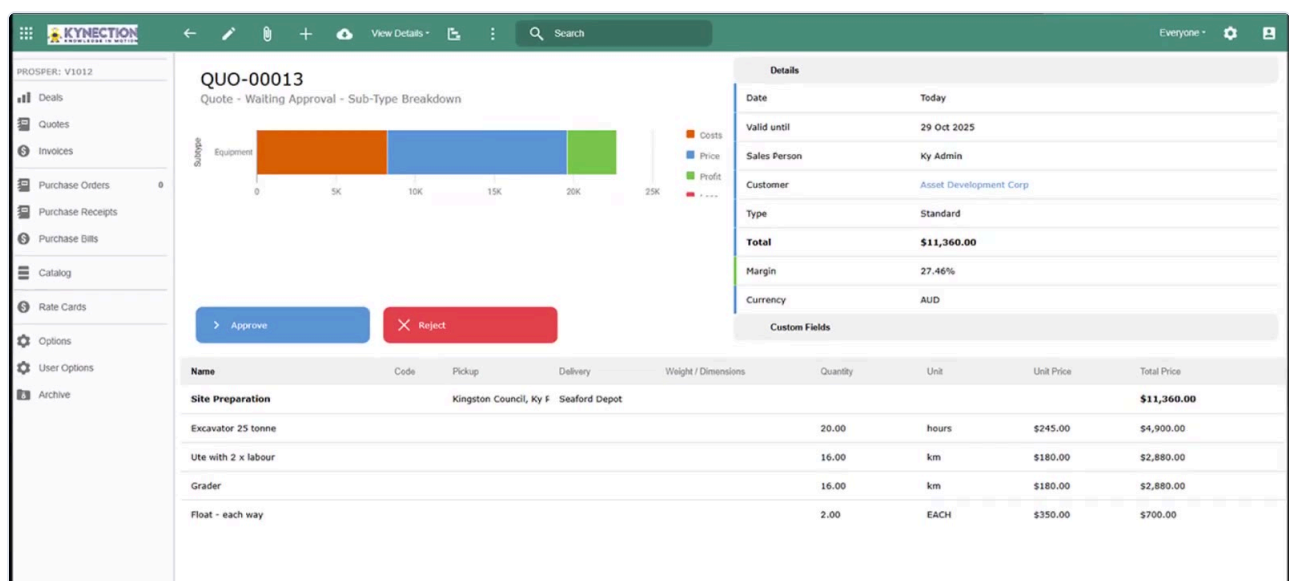


STEP 1 • 02:07 IN THE VIDEO

Add the lines

Within a section the add menu offers **Product**, **Non-Stock**, **Once Off Item** and **Note**. **Import Sections** and **Import Lines** pull from an existing quote.

CHAPTER 03 • STEP 1 OF 2



STEP 2 • 02:46 IN THE VIDEO

Review the totals

The quote shows its sub-type breakdown against the line items, so the mix of product, labour and equipment is visible before it goes out.

CHAPTER 03 • STEP 2 OF 2

Approve and create the project

Approval and confirmation are separate steps, and only confirmation releases the project.

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 • 02:55 IN THE VIDEO

Submit for approval

Submitting routes the quote to an approver, who can approve or reject it.

CHAPTER 04 • STEP 1 OF 2

STEP 2 • 03:15 IN THE VIDEO

Create the project

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

CHAPTER 04 • 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 deal to payment.

NEXT UP - Sales Web 03

Project invoicing and progress claims

BACK TO Sales Web 01

Master the sales module: deals, invoicing and inventory (module overview)

THE REST OF THE SALES MODULE

Ask your Kynnection account manager for the other guides in this series

MORE IN THIS MODULE

Sales Web 01 Master the sales module: deals, invoicing and inventory (module overview)

Sales Web 03 Project invoicing and progress claims

Sales Web 04 Batch create, send and track job invoices

Sales Web 05 Purchase orders and supplier bills

Sales Web 06 Product catalogue and custom rate cards
