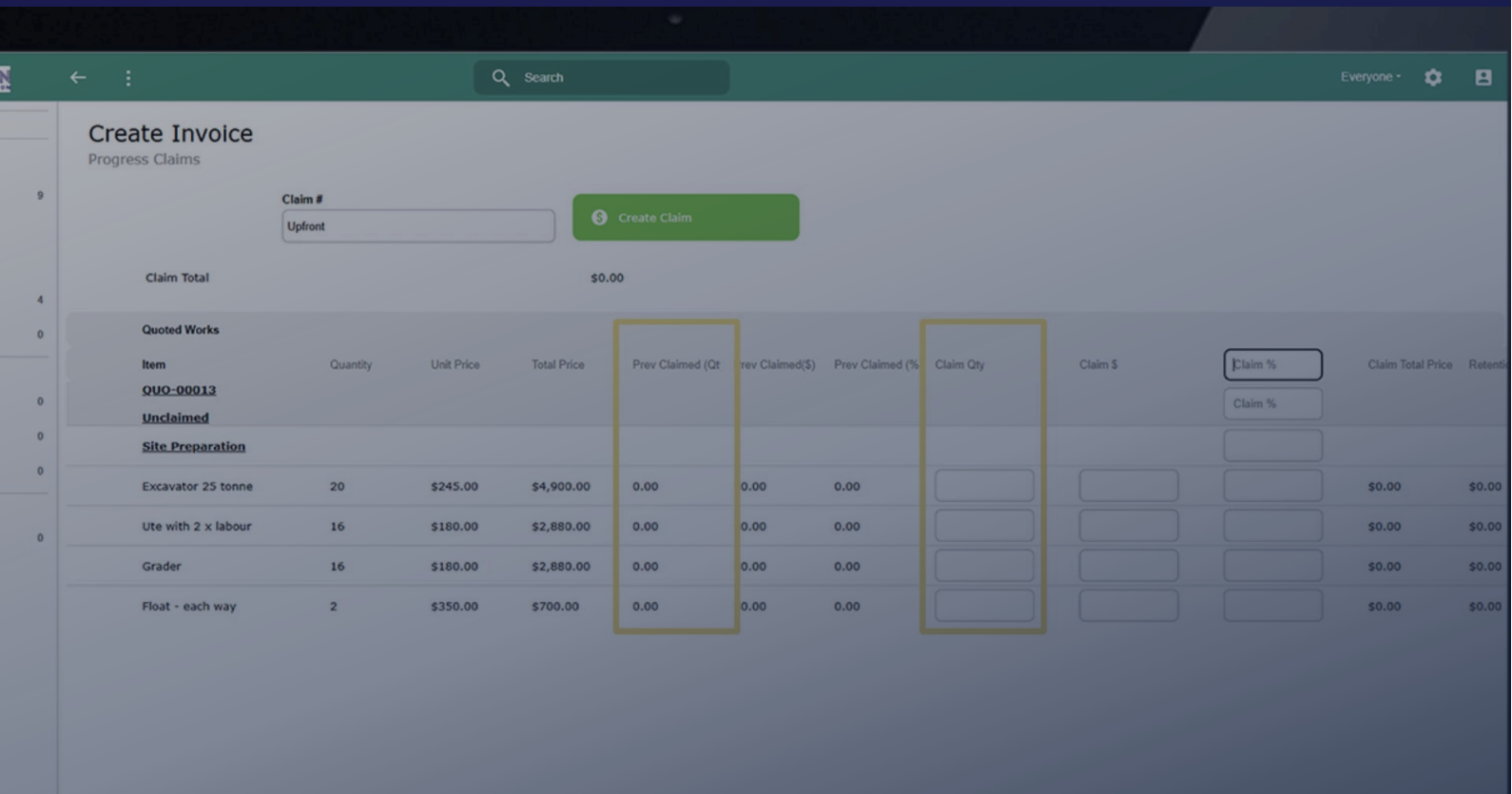




KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION • SALES (PROSPER) • PART 3 OF THE SALES MODULE

Project Invoicing and *Progress Claims*

Billing a project as the work proceeds. Raising a progress claim by quantity or by percentage, finalising the invoice, then the same job from the jobs module with its linked purchase orders and costs.

3 CHAPTERS

3 MIN 17 SEC

SALES (PROSPER)

WEB USERS • SALES & ACCOUNTS

FEATURE GUIDE • 3 MIN 17 SEC

What this feature covers

Three stages, eight steps: the project finance tab, entering claims two ways, and invoicing from the jobs module.

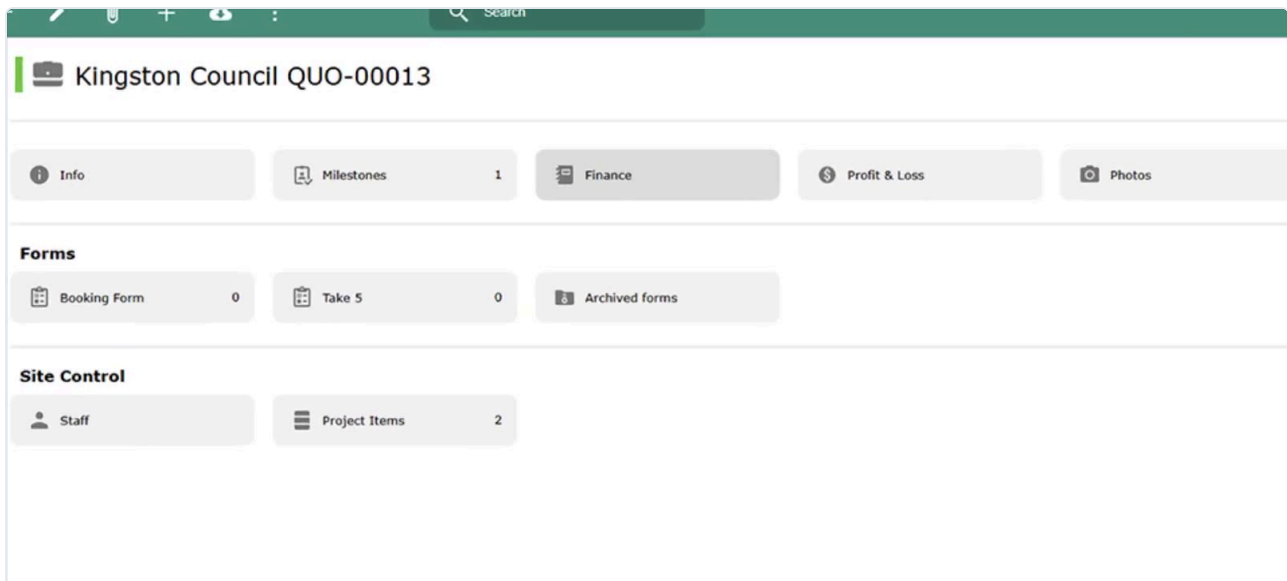
CH 01	Open the project finance tab Finance sits alongside info, milestones and profit and loss on the project.	00:00–00:48
CH 02	Enter the claim Every line shows what has been claimed before, so the new claim is entered in context.	00:48–01:55
CH 03	Invoice from the jobs module The other route to the same place: bill a completed job rather than a project stage.	01:55–03:17

- **Previously claimed is always shown.** Each line displays what has already been claimed against what you are claiming now, so over-claiming is caught as you type.
- **Quantity or percentage.** Measured work claims by quantity; lump-sum items claim by percentage. Both sit on the same claim.
- **Costs are visible before you bill.** A job shows its linked purchase orders, so margin is checked at the point of invoicing rather than afterwards.

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 project finance tab

Finance sits alongside info, milestones and profit and loss on the project.

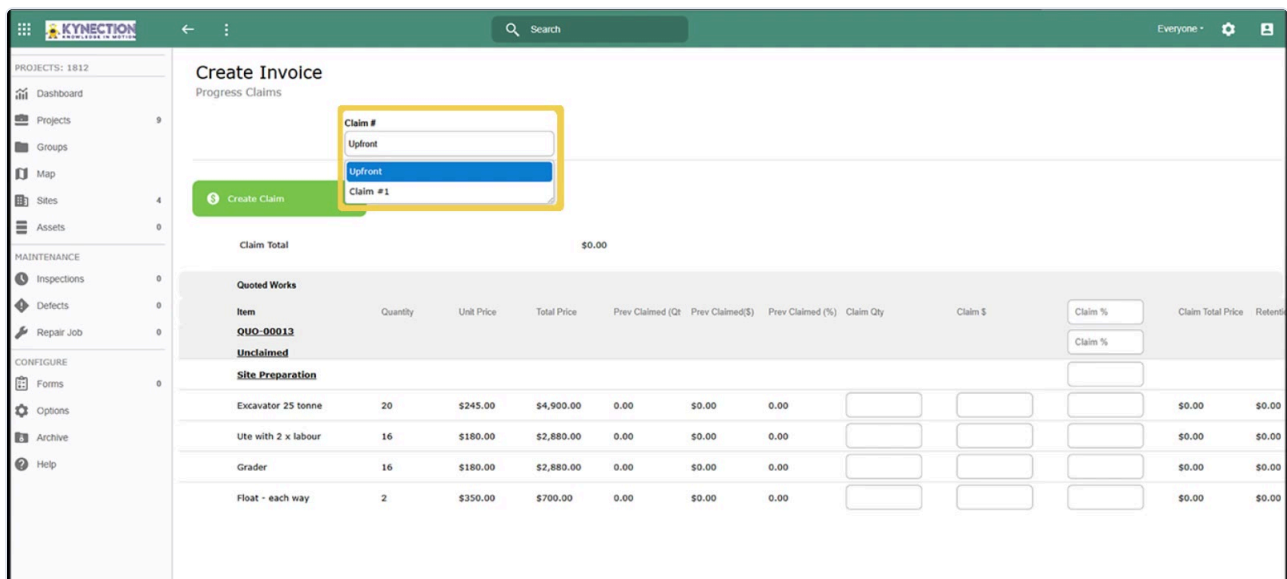


STEP 1 • 00:07 IN THE VIDEO

Find the finance tab

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

CHAPTER 01 • STEP 1 OF 2



STEP 2 • 00:30 IN THE VIDEO

Start the claim

Creating an invoice from the project opens the claim screen with the quoted works listed and a running claim total.

CHAPTER 01 • STEP 2 OF 2

Enter the claim

Every line shows what has been claimed before, so the new claim is entered in context.

Create Invoice
Progress Claims

Claim #
Upfront

Create Claim

Claim Total \$0.00

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

STEP 1 • 01:00 IN THE VIDEO

Claim by quantity

The columns show previously claimed quantity and value against this claim's quantity and value, with the line total updating as you go.

CHAPTER 02 • STEP 1 OF 3

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 %
Unclaimed									
Site Preparation									
Excavator 25 tonne	20	\$245.00	\$4,900.00	0.00	\$0.00	0.00			
Ute with 2 x labour	16	\$180.00	\$2,880.00	0.00	\$0.00	0.00			
Grader	16	\$180.00	\$2,880.00	0.00	\$0.00	0.00			
Float - each way	2	\$350.00	\$700.00	0.00	\$0.00	0.00			

STEP 2 • 01:28 IN THE VIDEO

Claim by percentage

A line can be claimed as a percentage instead, which suits lump-sum items that are not measured.

CHAPTER 02 • STEP 2 OF 3

Enter the claim

← ✎ 📁 + ☁️ Details 📄 : 🔍 Search

INV-00019

Invoice - Draft - Sub-Type Breakdown

● Equipment

Details

Date	Today
Valid until	29 Oct 2025
Sales Person	Ky Admin
Customer	Asset Development Corp
Project	Kingston Council QUO-00019
Quote	QUO-00013
Total	\$3,124.00
Currency	AUD

Custom Fields

> Submit

Name	Code	Sub-Type	Quantity	Unit	Unit Price	Subtotal	GST
Site Preparation						\$2,840.00	
Excavator 25 tonne		Equipment	20.00	hours	\$61.25	\$1,225.00	10%
Ute with 2 x labour		Equipment	16.00	km	\$45.00	\$720.00	10%

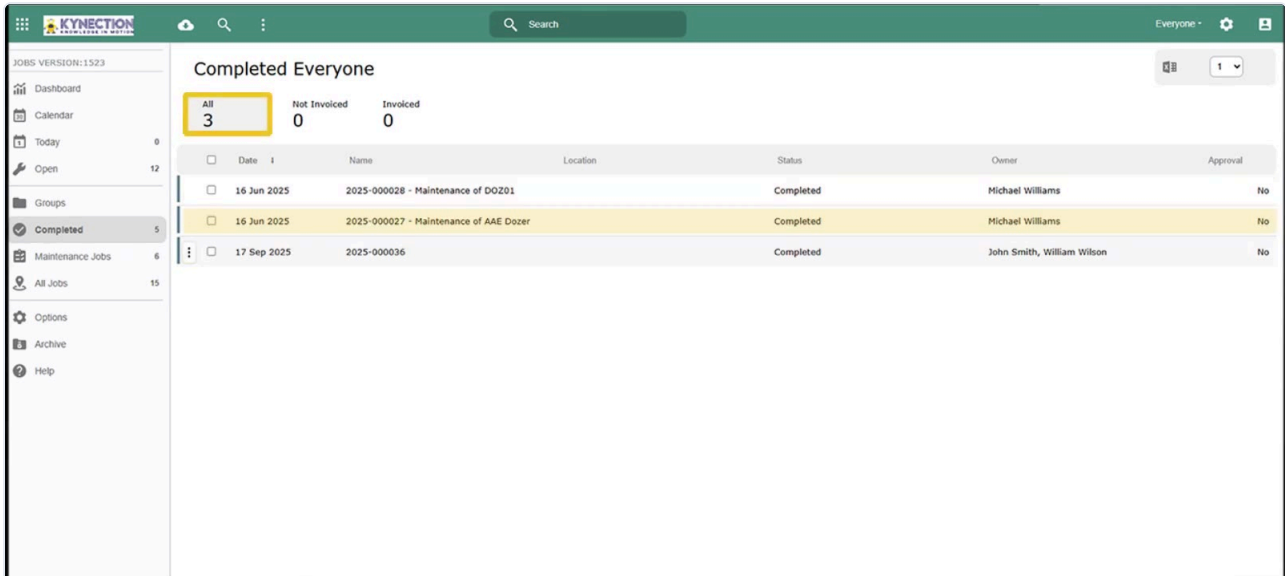
STEP 3 • 01:50 IN THE VIDEO

Finalise and submit

The draft invoice shows date, valid-until, sales person, customer, project, quote, currency and total, ready to submit.

Invoice from the jobs module

The other route to the same place: bill a completed job rather than a project stage.

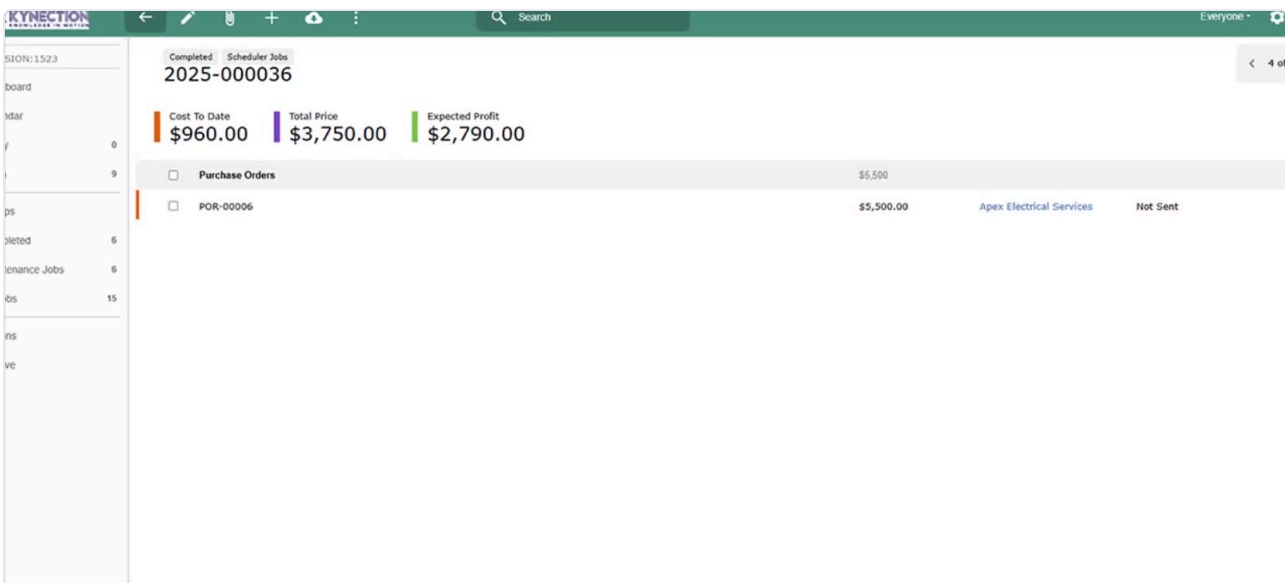


STEP 1 • 02:08 IN THE VIDEO

Find the completed jobs

The jobs list filtered to completed work shows what is ready to bill.

CHAPTER 03 • STEP 1 OF 3



STEP 2 • 02:36 IN THE VIDEO

Review items and purchase orders

A job shows its revenue and cost figures alongside any linked purchase orders, so margin is visible before the invoice is raised.

CHAPTER 03 • STEP 2 OF 3

Invoice from the jobs module

JOBS VERSION: 1523

Completed Scheduler Jobs
2025-000036

Cost To Date \$960.00 Total Price \$3,750.00 Expected Profit \$2,790.00

Purchase Orders		\$5,500
☐ POR-00006	\$5,500.00	Apex Electrical Services Not Sent Today

STEP 3 • 03:00 IN THE VIDEO

Add items and edit costs

New items can be added and job costs edited before invoicing, which is where a variation gets captured.

CHAPTER 03 • STEP 3 OF 3

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 04

Batch create, send and track job invoices

BACK TO Sales Web 02

Deals, quotes and creating a project

THE REST OF THE SALES MODULE

Ask your Kynecton 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 02 Deals, quotes and creating a project

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
