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Knowledge in Motion

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Details -

Search

Everyone

INV-00020

Invoice - Not Sent - Sub-Type Breakdown

100%

Equipment

> 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

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



KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION • SALES (PROSPER) • PART 4 OF THE SALES MODULE

Batch Create, Send and *Track Job Invoices*

Month-end in one pass. Batch creating invoices across several completed jobs, editing the drafts so they read properly, emailing them straight to the client, and tracking them through to paid.

4 CHAPTERS

3 MIN 38 SEC

SALES (PROSPER)

WEB USERS • ACCOUNTS

What this feature covers

Four stages, eight steps: batch creating, editing drafts, sending, and tracking on the dashboard.

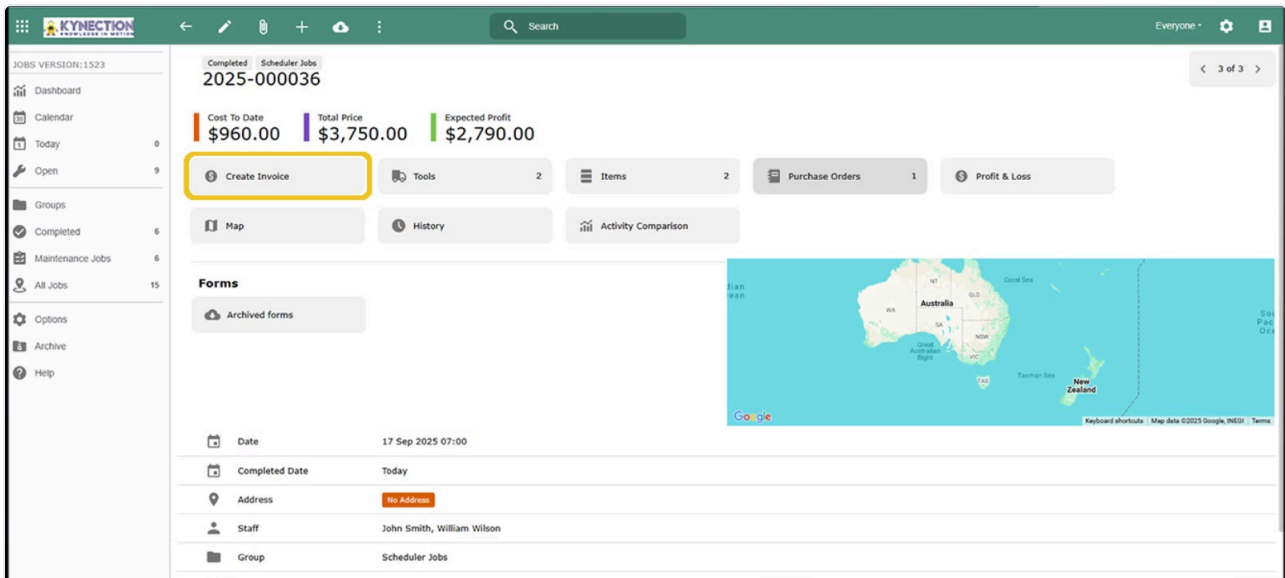
CH 01	Batch create the invoices Start from the completed jobs rather than from the invoice screen.	00:00–00:49
CH 02	Edit the drafts A draft can be restructured before it is submitted.	00:49–02:29
CH 03	Submit and send Submitting locks the invoice, then it goes out from the system.	02:29–03:17
CH 04	Track through to paid The dashboard is the receivables picture across the whole ledger.	03:17–03:38

- **Batch first, edit after.** Creating in bulk produces drafts. Nothing goes out until you have reviewed and submitted each one.
- **Descriptions are yours to set.** Sections and line descriptions can be rewritten so the invoice reads the way that client expects, without changing the underlying job.
- **Paid closes the loop.** Marking an invoice paid moves it on the dashboard, which is what keeps the receivables picture honest.

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.

Batch create the invoices

Start from the completed jobs rather than from the invoice screen.

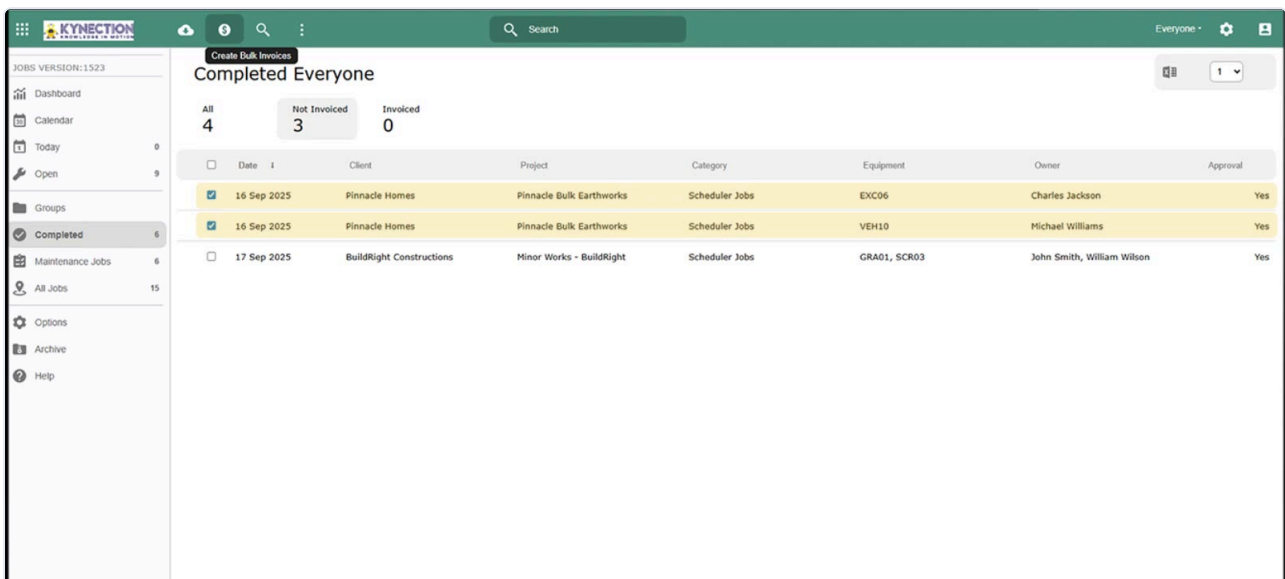


STEP 1 • 00:05 IN THE VIDEO

Open a completed job

A job shows its value, forms, site location and any linked purchase order, so you can see what you are about to bill.

CHAPTER 01 • STEP 1 OF 2



STEP 2 • 00:30 IN THE VIDEO

Select and create in bulk

From the completed jobs list, select the jobs to bill and create their invoices together in one action.

CHAPTER 01 • STEP 2 OF 2

Edit the drafts

A draft can be restructured before it is submitted.

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

100% Equipment

[Submit](#)

Details	
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								
Name	Code	Sub-Type	Quantity	Unit	Unit Price	Subtotal	GST	Total GST
2025-000032						\$700.00		\$70.00
Excavator 20 tonne		Equipment	16.00	hours	0.00	0.00	10%	0.00
Float - each way		Equipment	2.00	EACH	350.00	700.00	10%	70.00

STEP 1 • 01:15 IN THE VIDEO

Review the draft

The draft shows its sub-type breakdown with details: date, valid-until, sales person, customer, project, job and total.

CHAPTER 02 • STEP 1 OF 2

KYNECTION

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 • 02:05 IN THE VIDEO

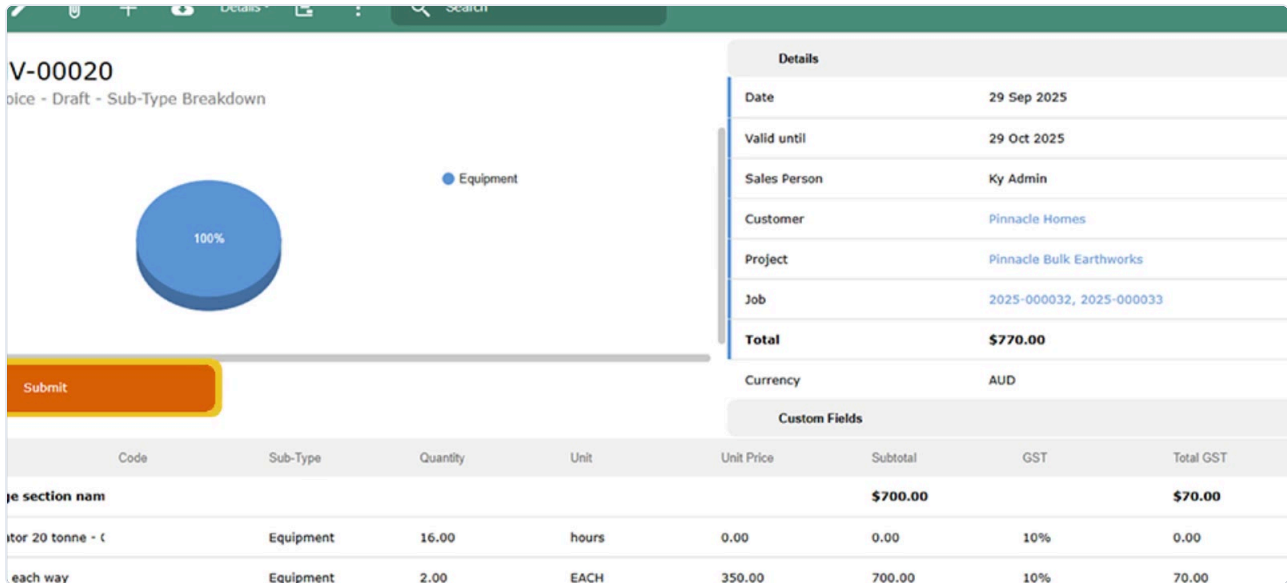
Customise sections and descriptions

Line items can be re-described and re-priced, with labour and other costs broken out, so the invoice reads the way the client expects.

CHAPTER 02 • STEP 2 OF 2

Submit and send

Submitting locks the invoice, then it goes out from the system.



The screenshot shows the 'V-00020' invoice in 'Draft' status. A pie chart indicates 100% of the items are 'Equipment'. A prominent orange 'Submit' button is visible. To the right, a 'Details' panel lists invoice information: Date (29 Sep 2025), Valid until (29 Oct 2025), Sales Person (Ky Admin), Customer (Pinnacle Homes), Project (Pinnacle Bulk Earthworks), Job (2025-000032, 2025-000033), Total (\$770.00), and Currency (AUD). Below this is a 'Custom Fields' section. The main table lists items with columns for Code, Sub-Type, Quantity, Unit, Unit Price, Subtotal, GST, and Total GST.

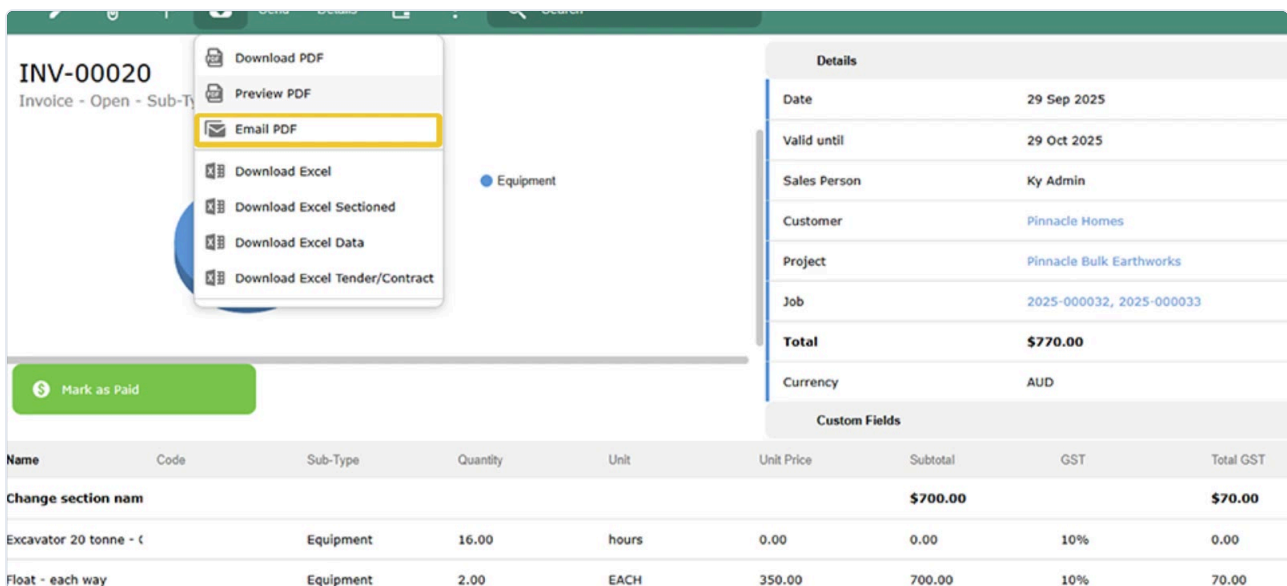
Code	Sub-Type	Quantity	Unit	Unit Price	Subtotal	GST	Total GST
Change section name					\$700.00		\$70.00
Excavator 20 tonne - €	Equipment	16.00	hours	0.00	0.00	10%	0.00
Float - each way	Equipment	2.00	EACH	350.00	700.00	10%	70.00

STEP 1 • 02:37 IN THE VIDEO

Submit the invoice

Submitting moves it out of draft and makes it ready to send.

CHAPTER 03 • STEP 1 OF 2



The screenshot shows the 'INV-00020' invoice in 'Open' status. A dropdown menu is open, highlighting the 'Email PDF' option. Other options include 'Download PDF', 'Preview PDF', 'Download Excel', 'Download Excel Sectioned', 'Download Excel Data', and 'Download Excel Tender/Contract'. A green 'Mark as Paid' button is also visible. The 'Details' panel on the right is identical to the previous screenshot. The main table lists items with columns for Name, Code, Sub-Type, Quantity, Unit, Unit Price, Subtotal, GST, and Total GST.

Name	Code	Sub-Type	Quantity	Unit	Unit Price	Subtotal	GST	Total GST
Change section name					\$700.00			\$70.00
Excavator 20 tonne - €		Equipment	16.00	hours	0.00	0.00	10%	0.00
Float - each way		Equipment	2.00	EACH	350.00	700.00	10%	70.00

STEP 2 • 03:00 IN THE VIDEO

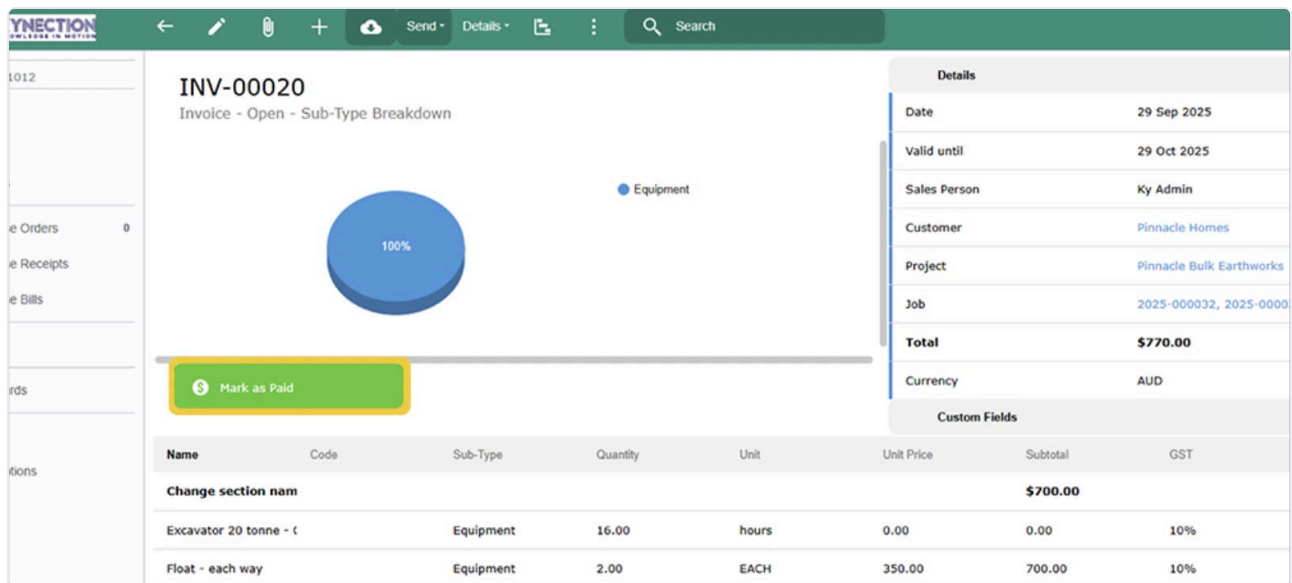
Email it to the client

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

CHAPTER 03 • STEP 2 OF 2

Track through to paid

The dashboard is the receivables picture across the whole ledger.

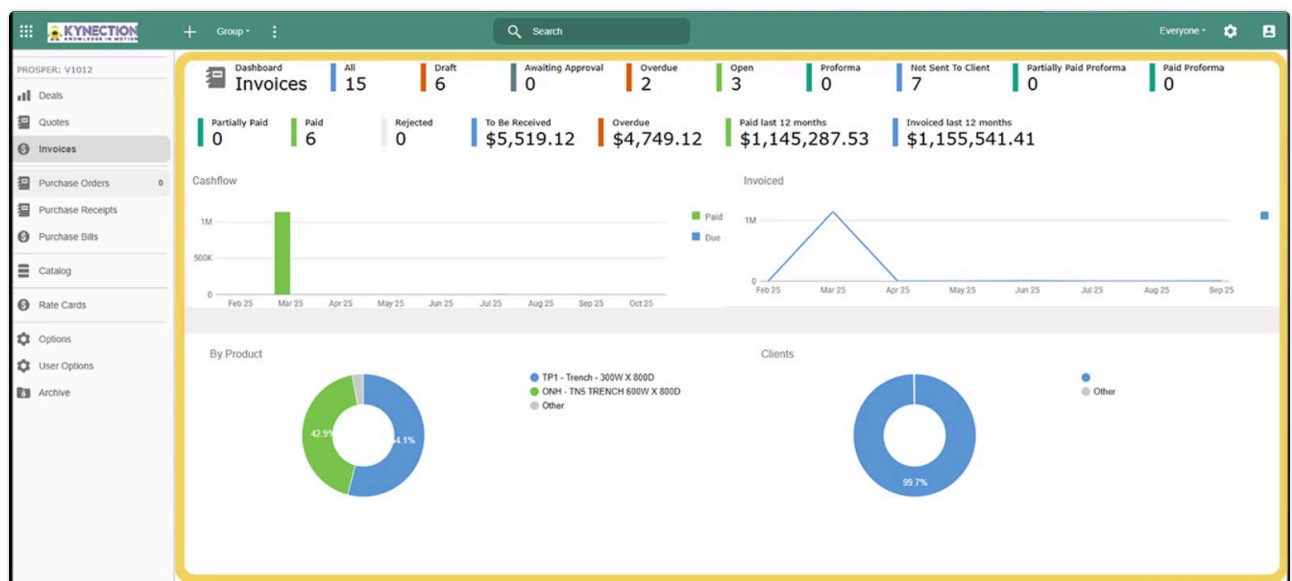


STEP 1 • 03:21 IN THE VIDEO

Mark it paid

Mark as Paid closes the invoice off once payment lands.

CHAPTER 04 • STEP 1 OF 2



STEP 2 • 03:32 IN THE VIDEO

Read the invoices dashboard

The dashboard counts and values invoices by status, with charts for the trend, so the ageing picture is visible at a glance.

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 05

Purchase orders and supplier bills

BACK TO Sales Web 03

Project invoicing and progress claims

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 03 Project invoicing and progress claims

Sales Web 05 Purchase orders and supplier bills

Sales Web 06 Product catalogue and custom rate cards
