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Edit Stock

Subitems

Name

Code

Barcode

Sales Account Code

Purchase Account Code

Category

Type

Product

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



KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION • SALES (PROSPER) • PART 6 OF THE SALES MODULE

Product Catalogue and *Custom Rate Cards*

The pricing foundation everything else draws on. Adding catalogue items with labour as a sub-item, then building customer and supplier rate cards that override the standard price.

3 CHAPTERS

2 MIN 14 SEC

SALES (PROSPER)

WEB USERS • SALES ADMIN

What this feature covers

Three stages, seven steps: the catalogue, adding an item with labour, and building rate cards both ways.

CH 01	Read the catalogue Items are split by type, each carrying its own codes and pricing.	00:00-00:50
CH 02	Add labour and customer rates Labour attaches beneath a product, so a supply-and-install line prices as one item.	00:50-01:26
CH 03	Set rates and minimums A card sets price, unit and minimum quantity per item, on both the selling and buying side.	01:26-02:14

- **Rate cards override the catalogue.** An agreed client price applies automatically on every quote and invoice, rather than depending on someone remembering it.
- **Minimum invoice quantities are enforced.** Set a minimum against an item and short-billing it is prevented at the point of invoicing.
- **Bulk import beats typing.** Customer rates can be imported rather than entered line by line, which matters on a large price list.

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.

Read the catalogue

Items are split by type, each carrying its own codes and pricing.

Name	Code	Sub-Type	Category	Amount	Unit	Unit Price
Additional Maintenance Item			Maintenance - Servicing / Faults	0	EACH	\$0.00
Additional Service Item			Maintenance - Servicing / Faults	0	EACH	\$0.00
Additional Service Item - Adhoc			Maintenance - Servicing / Faults	0	EACH	\$0.00
Air Filter Inner - K127260X	567		Maintenance - Servicing / Faults	0	EACH	\$0.00
Air Filter Primary - P535770			Maintenance - Servicing / Faults	0	EACH	\$0.00
Allocated Additional Service Item			Maintenance - Servicing / Faults	0	EACH	\$0.00
Brake Light			Maintenance - Servicing / Faults	0	EACH	\$0.00
Brake Light - Allocated			Maintenance - Servicing / Faults	0	EACH	\$0.00
Coolant	179		Maintenance - Servicing / Faults	0	LITRE	\$0.00
Differential oil	179		Maintenance - Servicing / Faults	0	LITRE	\$0.00
Drive Axle Oil	5120		Maintenance - Servicing / Faults	0	LITRE	\$0.00
Engine Oil - TO-TOW4D	671		Maintenance - Servicing / Faults	0	LITRE	\$0.00

STEP 1 • 00:08 IN THE VIDEO

Open the catalogue

Items are split across stock, non-stock, purchase order and package tabs, each listed with its code, category and pricing.

CHAPTER 01 • STEP 1 OF 2

Edit Stock

Subitems

Name

Barcode

Purchase Account Code

Type

Product

Manufacturer

Terms

Code

Sales Account Code

Category

Subtype

Owner

☐ Package

Details

Cost

Sale

STEP 2 • 00:32 IN THE VIDEO

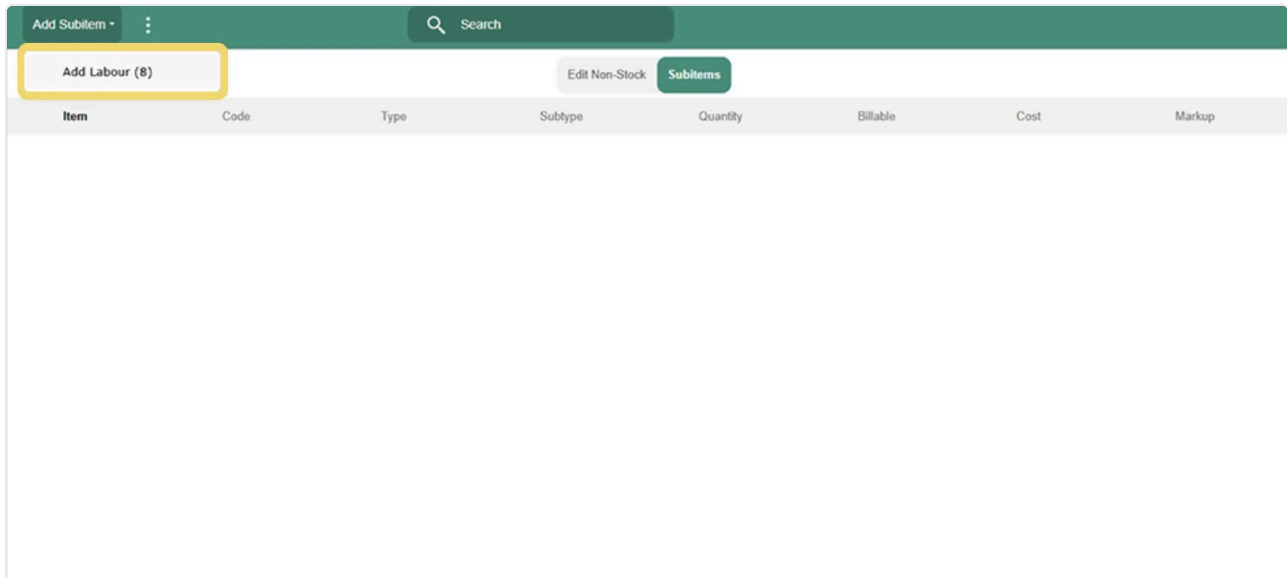
Add an item

A new item takes a name, code, sales and purchase account codes, category, subtype, type, manufacturer and owner, with a package option for bundled items.

CHAPTER 01 • STEP 2 OF 2

Add labour and customer rates

Labour attaches beneath a product, so a supply-and-install line prices as one item.

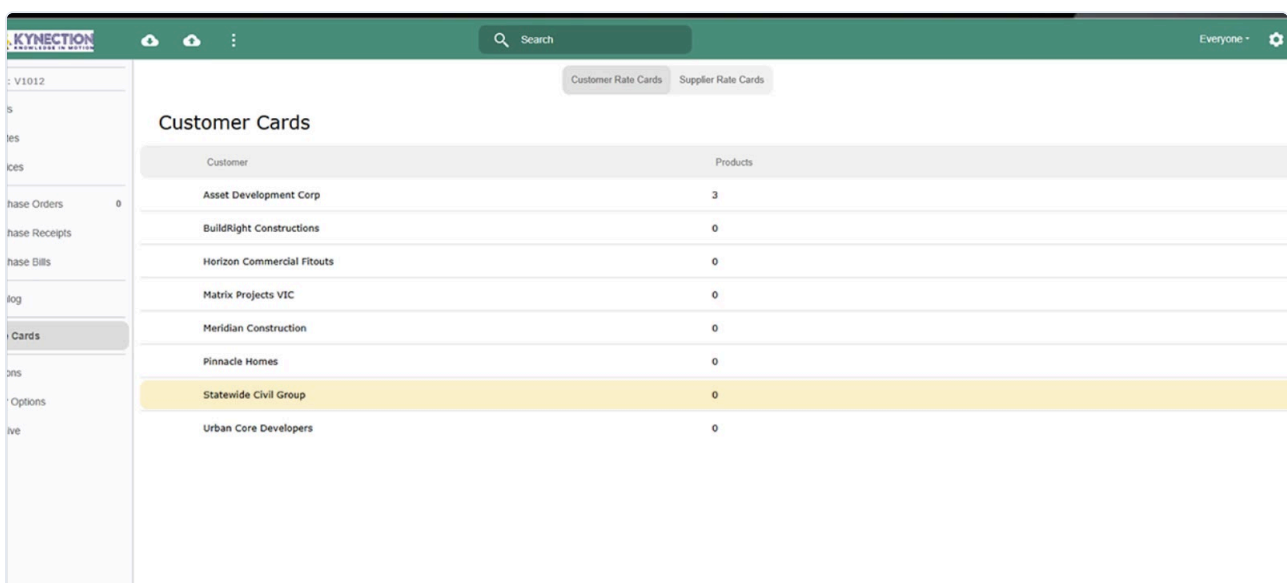


STEP 1 • 00:55 IN THE VIDEO

Add labour as a sub-item

Labour is added beneath the product rather than as a separate line, which keeps the quote readable while still costing correctly.

CHAPTER 02 • STEP 1 OF 2



STEP 2 • 01:10 IN THE VIDEO

Open the customer cards

Each customer can hold its own rate card. The list shows every client with a card configured against them.

CHAPTER 02 • STEP 2 OF 2

Set rates and minimums

A card sets price, unit and minimum quantity per item, on both the selling and buying side.

PROSPER: V1012

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

Asse

Select Product (*) B2 Boring/Directional 200 mm h Sale Price (*) 73.54

GST % (*) 0 Discount %

Purchase Price (*) 0 Project

Role Warehouse

Invoicing

Sales Code Purchase Code

Time Code Minimum Invoiced Quantity

Maximum Invoiced Quantity Invoice Product Name

Invoice Description

Add Customer Details

Catalog Reference

Name	B2 Boring/Directional 200 mm h
Base Price	73.54
GST (%)	0

STEP 1 • 01:27 IN THE VIDEO

Set the customer rates

Each item on the card takes a unit price, sale unit and costing reference. Rates can be bulk imported rather than typed one at a time.

CHAPTER 03 • STEP 1 OF 3

PROSPER: V1012

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

Asse

Select Product (*) B2 Boring/Directional 200 mm h Sale Price (*) 73.54

GST % (*) 0 Discount %

Purchase Price (*) 0 Project

Role Warehouse

Invoicing

Sales Code Purchase Code

Time Code Minimum Invoiced Quantity

Maximum Invoiced Quantity Invoice Product Name

Invoice Description

Add Customer Details

Catalog Reference

Name	B2 Boring/Directional 200 mm h
Base Price	73.54
GST (%)	0

STEP 2 • 01:36 IN THE VIDEO

Apply a minimum invoice quantity

A minimum quantity against an item prevents it being billed short, which protects call-out and mobilisation charges.

CHAPTER 03 • STEP 2 OF 3

Set rates and minimums

PROSPER: V1012

Deals

Quotes

Invoices

Purchase Orders 0

Purchase Receipts

Purchase Bills

Catalog

Rate Cards

Options

User Options

Archive

Search

Everyone

V2 Concrete/Rock Breaking Supplier Card

Supplier Item Code

Purchase Price 150

GST % 0

Minimum Order Quantity 0

Amount 0

Currency Australian Dollar

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

Finished Editing

Delete

STEP 3 • 02:00 IN THE VIDEO

Build a supplier card

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

CHAPTER 03 • STEP 3 OF 3

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.

[BACK TO Sales Web 05](#)

Purchase orders and supplier bills

[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 02](#) Deals, quotes and creating a project

[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
