

KINTO Operations & QA Management System

End-User Manual

Complete Guide for All Users

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This manual covers all features and workflows in the KINTO system
with step-by-step instructions for end users.

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1. Getting Started

Welcome to KINTO Operations & QA Management System! This manual will guide you through all features and workflows to help you work efficiently.

1.1 System Overview

KINTO is a comprehensive manufacturing management system that handles:

- Quality assurance and preventive maintenance
- Production planning and execution
- Inventory and raw material tracking
- Sales, invoicing, and dispatch
- Financial tracking and reporting
- User and role management

1.2 User Roles

The system supports four main user roles:

Administrator

Full system access including user management, configuration, and all operations.

Manager

Access to production, inventory, sales, and reporting. Can approve transactions.

Operator

Executes daily operations: checklists, production entries, material issuance.

Reviewer

Reviews and approves QA checklists and quality control submissions.

1.3 Logging In

- Step 1:** Open your web browser and navigate to the KINTO system URL
- Step 2:** Enter your username or email address
- Step 3:** Enter your password
- Step 4:** Click the "Sign In" button

& Important: If you forget your password, contact your system administrator for reset.

After Login:

- You will see your personalized dashboard
- Navigation menu on the left shows features you have access to
- Your username appears in the top right corner

2. Quality Assurance & Maintenance

2.1 QA Checklist Management

QA checklists help ensure quality standards are met during production.

For Operators: Completing a Checklist

- Step 1:** Navigate to "QA Checklists" from the left menu
- Step 2:** Click "New Submission" button
- Step 3:** Select the checklist template assigned to you
- Step 4:** Select the machine being checked
- Step 5:** Fill in your observations for each checkpoint:
- Mark as ' (Pass) if everything is normal
 - Mark as ' (Fail) if there are issues
 - Add remarks explaining any failures
- Step 6:** Upload photos if required (for failed items or evidence)
- Step 7:** If spare parts are needed, add them in the spare parts section
- Step 8:** Click "Submit for Review" when complete

' **Best Practice** Take clear photos of any issues found. This helps reviewers and maintenance teams.

For Reviewers: Approving Checklists

Step 1: Navigate to "Reviewer Dashboard" from the left menu

Step 2: You will see three tabs:

- Pending Review - Checklists waiting for your approval
- Reviewed - Checklists you have already reviewed
- All - Complete history

Step 3: Click on a submission to review details

Step 4: Review all checkpoints and observations

Step 5: Check uploaded photos if available

Step 6: Choose one action:

- Approve - If everything is acceptable
- Reject - If rework or corrections are needed

Step 7: Add reviewer comments explaining your decision

Step 8: Click "Confirm" to complete the review

& Important Checks Before Approving:

- All required checkpoints are completed
- Photos are provided for failed items
- Operator remarks are clear and detailed
- Spare parts requests are justified

2.2 Preventive Maintenance

Preventive maintenance schedules help avoid machine breakdowns and maintain efficiency.

Creating a PM Schedule

Step 1: Navigate to "Preventive Maintenance" from the left menu

Step 2: Click "Create PM Schedule" button

Step 3: Select the machine requiring maintenance

Step 4: Choose the maintenance template (checklist)

Step 5: Set the schedule frequency:

- Daily - For routine checks
- Weekly - For regular maintenance
- Monthly - For comprehensive service
- Custom - For special schedules

Step 6: Assign responsible operator/technician

Step 7: Set start date and time

Step 8: Click "Create Schedule"

Executing Preventive Maintenance

Step 1: Navigate to "PM Execution" tab

Step 2: Find your assigned maintenance task (shows as "Pending")

Step 3: Click "Start" to begin the maintenance

Step 4: Complete all maintenance checkpoints

Step 5: Record observations and measurements

Step 6: Note any parts replaced or issues found

Step 7: Click "Complete" when finished

& Before Completing PM:

- All checklist items are addressed
- Replacement parts are documented
- Machine is tested and running properly

2.3 Machine Startup Reminders

Automated reminders ensure machines are properly started at shift beginning.

How It Works

- System sends WhatsApp/Email reminders before shift start
- Operator confirms machine startup via WhatsApp or system
- Manager can track which machines are running

For Operators: Responding to Startup Reminders

- Step 1:** Receive WhatsApp message: "Time to start Machine ABC"
- Step 2:** Perform machine startup procedures
- Step 3:** Reply to WhatsApp message or click system link
- Step 4:** Confirm startup completion

For Managers: Configuring Reminders

- Step 1:** Navigate to "Machine Startup Reminders"
- Step 2:** Click "New Reminder"
- Step 3:** Select machine
- Step 4:** Set shift and start time
- Step 5:** Assign operator
- Step 6:** Set reminder time (e.g., 15 minutes before)
- Step 7:** Enable WhatsApp and/or Email notifications
- Step 8:** Click "Create Reminder"

3. Manufacturing & Production

3.1 Product Master & Bill of Materials (BOM)

Product master defines your finished products and the raw materials needed to make them.

Creating a New Product

Step 1: Navigate to "Product Master" from left menu

Step 2: Click "Add Product" button

Step 3: Fill in Basic Information tab:

- Product Code - Unique identifier (e.g., "PROD-001")
- Product Name - Descriptive name
- Category & Type - Select from dropdown
- Unit of Measure - Pieces, KG, Liters, etc.

Step 4: Switch to "Bill of Materials" tab

Step 5: Click "Add Raw Material" for each material needed:

- Select raw material from dropdown
- Enter quantity required per product unit
- System shows available stock

Step 6: Review BOM totals at bottom

Step 7: Click "Save Product"

& Important Checks:

- Product code must be unique
- BOM quantities must account for wastage
- All required raw materials are added

Editing an Existing Product

Step 1: Find product in list and click "Edit"

Step 2: Modify basic information or BOM as needed

Step 3: Click "Save Product"

' **Note:** Changing BOM affects future production entries but not historical data.

3.2 Raw Material Management

Manage raw material inventory, purchases, and issuance for production.

Adding Raw Material Stock

- Step 1:** Navigate to "Inventory Management" ! "Raw Materials" tab
- Step 2:** Click "Add Raw Material" button
- Step 3:** Select material type from dropdown
- Step 4:** Enter received quantity
- Step 5:** Enter invoice/GRN details for tracking
- Step 6:** Click "Add Stock"

' Stock Tracking Modes:

- Opening Stock Entry Only - For initial setup
- Ongoing Inventory - For continuous tracking

Viewing Raw Material Stock Levels

- Step 1:** Go to "Inventory Management" ! "Raw Materials" tab
- Step 2:** View current stock levels in the table:
 - Green - Adequate stock
 - Yellow - Low stock warning
 - Red - Out of stock or critical
- Step 3:** Click on material name to see detailed history

Creating Purchase Orders

- Step 1:** Navigate to "Purchase Orders"
- Step 2:** Click "Create PO" button
- Step 3:** Select vendor from dropdown
- Step 4:** Add items to purchase order:
 - Select raw material
 - Enter quantity needed
 - Enter unit price
- Step 5:** Review totals (Subtotal, GST, Grand Total)
- Step 6:** Click "Create Purchase Order"

& Before Creating PO:

- Check current stock levels first
- Verify vendor is active and approved
- Ensure quantities meet minimum order requirements

3.3 BOM-Driven Raw Material Issuance

Issue raw materials for production based on product BOM, ensuring accurate quantity calculation.

Creating a Material Issuance

Step 1: Navigate to "Inventory Management" ! "Issuances" tab

Step 2: Click "New Issuance" button

Step 3: Fill issuance details:

- Issuance Date - When materials are being issued
- Shift - Morning/Evening/Night
- Issued By - Your name (auto-filled)

Step 4: Select Product from dropdown

Step 5: Enter planned production quantity

Step 6: Click "Auto-Populate from BOM"

- System automatically calculates required raw materials
- All BOM items appear with correct quantities

Step 7: Review calculated quantities:

- Check if sufficient stock is available
- Adjust quantities if needed (e.g., for extra wastage)

Step 8: Click "Issue Materials"

' How Auto-Population Works:

- System reads product BOM
- Multiplies BOM quantities by planned production
- Accounts for conversion factors (KG to grams, etc.)
- Shows "Stock Insufficient" warning if needed

& Important Checks Before Issuance:

- Verify sufficient raw material stock
- Confirm production quantity is realistic
- Check shift and date are correct
- Review auto-calculated quantities for accuracy

3.4 Production Entry & Variance Analysis

Record actual production output and compare against raw material issuance to track efficiency.

Recording Production Output

Step 1: Navigate to "Production Entries"

Step 2: Click "New Production Entry" button

Step 3: Select the raw material issuance this production is linked to

- Shows issuance date, shift, and materials issued

Step 4: Enter actual production details:

- Production Date - When production occurred
- Shift - Must match issuance shift
- Actual Quantity Produced - Total output

Step 5: Enter quality breakdown:

- OK Quantity - Good products
- Scrap Quantity - Rejected/waste
- Rework Quantity - Items needing correction

Step 6: Add production notes (optional)

Step 7: Click "Save Production Entry"

Understanding Variance Analysis

After saving, system automatically calculates:

- Expected Production - Based on raw materials issued
- Actual Production - What you just entered
- Variance % - Difference between expected and actual
- Status Indicator:
 - Green (<5%) - Normal variance
 - Yellow (5-10%) - Attention needed
 - Red (>10%) - Investigation required

& Important Checks:

- OK + Scrap + Rework must equal Total Produced
- Shift must match the issuance shift
- Production date should be same or after issuance date
- High variance requires explanation in notes

3.5 Production Reconciliation

End-of-day reconciliation to account for all raw materials and adjust for actual consumption.

Creating a Reconciliation Entry

Step 1: Navigate to "Production Reconciliations"

Step 2: Click "New Reconciliation" button

Step 3: Select the production entry to reconcile

Step 4: System shows:

- Raw materials issued (expected consumption)
- Production output (actual produced)

Step 5: Enter actual material consumption for each raw material:

- Used Quantity - Actually consumed in production
- Returned Quantity - Unused materials returned to stock

Step 6: System calculates Net Consumed automatically:

Net Consumed = Issued - Returned

Step 7: Add reconciliation notes explaining any major differences

Step 8: Click "Save Reconciliation"

What Happens After Reconciliation

- Returned materials are added back to raw material inventory
- Variance report shows efficiency metrics
- Audit trail is created for traceability

& Reconciliation Rules:

- Can only reconcile after production entry exists
- Returned quantity cannot exceed issued quantity
- Operators can edit for 24 hours, Managers can edit anytime

3.6 Variance Analytics Dashboard

Visual analytics to track production efficiency trends and identify improvement opportunities.

Accessing Variance Analytics

Step 1: Navigate to "Variance Analytics" from left menu

Step 2: Select time period:

- Last 7 Days
- Last 30 Days
- Last 90 Days
- Custom Date Range

Step 3: View key metrics displayed:

- Average Production Variance %
- Average Material Variance %
- Total Production Entries
- Reconciliation Rate

Understanding the Charts

1. Variance Trend Over Time

Line chart showing variance % for each production entry.

- Green line = Good efficiency (<5% variance)
- Yellow line = Moderate (5-10% variance)
- Red line = Needs attention (>10% variance)

2. Production by Product

Bar chart showing total production quantities by product type.

3. Material Consumption Analysis

Shows which raw materials have highest variance or consumption.

' How to Use Analytics:

- Identify patterns in variance trends
- Spot products or shifts with consistent issues
- Take corrective actions for high-variance items
- Share reports with management for continuous improvement

4. Sales & Finance

4.1 Sales Invoice Management

Create GST-compliant invoices for customer orders and track payments.

Creating a Sales Invoice

Step 1: Navigate to "Sales Dashboard" from left menu

Step 2: Click "Create Invoice" button

Step 3: Fill customer information:

- Customer Name
- GSTIN (if applicable)
- Billing Address
- Shipping Address (if different)

Step 4: Add invoice items:

- Select Finished Good from dropdown
- Enter quantity
- Enter unit price
- System calculates line total automatically
- Click "Add Item" for more products

Step 5: Review GST calculations:

- CGST - Central GST (for intra-state)
- SGST - State GST (for intra-state)
- IGST - Integrated GST (for inter-state)

Step 6: Enter payment terms (e.g., "Net 30 Days")

Step 7: Add invoice notes if needed

Step 8: Click "Create Invoice"

& Before Creating Invoice:

- Verify finished goods have passed quality approval
- Confirm customer GSTIN is correct for tax calculations
- Check stock availability for all items
- Ensure prices include/exclude GST as per agreement

Printing and Sending Invoices

Step 1: After creating invoice, click "View Details"

Step 2: Click "Print Invoice" button

Step 3: PDF invoice opens in new tab with company branding

Step 4: Save or print PDF for records

4.2 5-Stage Dispatch Tracking Workflow

Complete dispatch workflow from invoice creation to delivery confirmation with gatepass generation.

The 5 Stages of Dispatch

Stage 1: Ready for Gatepass

Invoice created and approved, ready for dispatch processing.

Stage 2: Gatepass Generated

Gatepass created with vehicle and transporter details.

Stage 3: Dispatched

Goods loaded and vehicle left the premises.

Stage 4: Out for Delivery

Goods in transit to customer location.

Stage 5: Delivered

Goods received by customer with proof of delivery.

Stage 2: Generating a Gatepass

- Step 1:** Navigate to "Dispatch Tracking"
- Step 2:** Find invoice in "Ready for Gatepass" section
- Step 3:** Click "Generate Gatepass" button
- Step 4:** Fill gatepass details:
- Vehicle Number - Registration plate
 - Driver Name - Full name
 - Driver Mobile - Contact number
 - Transporter Name - Logistics company
 - Expected Delivery Date
- Step 5:** Click "Generate Gatepass"
- Step 6:** Print gatepass for security gate records

& Important:

Inventory is deducted only when gatepass is generated (not at invoice creation).

Stage 3-5: Updating Dispatch Status

- Step 1:** Find the shipment in appropriate section
- Step 2:** Click "Mark as Dispatched" when vehicle leaves
- Step 3:** Click "Mark Out for Delivery" when goods are in transit
- Step 4:** Click "Mark as Delivered" when customer receives goods
- Step 5:** Upload proof of delivery (POD) if available:
- Signed delivery receipt
 - Customer acknowledgment
 - Digital signature

4.3 Payment Tracking & FIFO Allocation

Track customer payments and automatically allocate to oldest unpaid invoices using FIFO method.

Recording a Customer Payment

- Step 1:** Navigate to "Pending Payments" from left menu
- Step 2:** Find customer in the list showing outstanding amount
- Step 3:** Click "Record Payment" button
- Step 4:** Enter payment details:
- Payment Amount - How much customer paid
 - Payment Date - When payment was received
 - Payment Method - Cash/Cheque/NEFT/UPI
 - Reference Number - Cheque/Transaction number
- Step 5:** System automatically allocates to oldest invoices (FIFO)
- Step 6:** Review allocation summary before confirming
- Step 7:** Add payment notes if needed
- Step 8:** Click "Record Payment"

Understanding FIFO Allocation

Example: Customer has 3 unpaid invoices:

- Invoice #001: ₹10,000 (oldest)
- Invoice #002: ₹15,000
- Invoice #003: ₹20,000 (newest)

Customer pays 118,000. System allocates:

- 110,000 to Invoice #001 (fully paid ')
- 18,000 to Invoice #002 (partially paid, 17,000 pending)
- 10 to Invoice #003 (unpaid)

Viewing Payment History

- Step 1:** Go to "Pending Payments" page
- Step 2:** Click on customer name to expand details
- Step 3:** View invoice-wise breakdown:
- Invoice Amount
 - Amount Paid
 - Outstanding Balance
 - Payment dates and methods

4.4 Sales Returns & Credit Notes

Handle post-delivery returns with quality segregation and automatic credit note generation.

Step 1: Creating a Sales Return

- Step 1:** Navigate to "Sales Returns"
- Step 2:** Click "Create Return" button
- Step 3:** Select original invoice from dropdown
- Step 4:** Enter return details:
- Return Date - When goods were returned
 - Return Reason - Defective/Wrong Item/Quality Issue
 - Quantity Returned - How many units
- Step 5:** Add detailed notes explaining the return
- Step 6:** Click "Create Return"

Step 2: Quality Segregation

- Step 1:** Find return in "Pending Segregation" tab
- Step 2:** Click "Segregate" button
- Step 3:** Physically inspect returned goods
- Step 4:** Categorize items:
- Good Quantity - Can be resold or restocked
 - Damaged Quantity - Cannot be used/sold
- Step 5:** Good + Damaged must equal Total Returned

Step 6:

Select disposition for good items:

Return to Stock - Add back to inventory

Scrap - Dispose/recycle

- Step 7:** Add segregation notes
- Step 8:** Click "Complete Segregation"

Step 3: Automatic Credit Note Generation

System automatically generates credit note based on return date:

Same Month Return:

Credit note auto-generated immediately upon segregation completion.

Previous Month Return:

Manual credit note request created for manager approval due to accounting period.

Viewing Credit Notes

- Step 1:** Navigate to "Credit Notes" from left menu
- Step 2:** View list of all credit notes with:
- Credit Note Number
 - Original Invoice Reference
 - Credit Amount (including GST)
 - Status (Issued/Applied)
- Step 3:** Click "View Details" to see full credit note
- Step 4:** Click "Print" to generate PDF for customer

& Important Notes:

- Credit notes reduce customer outstanding balance
- Good items returned to stock increase inventory
- Damaged items are written off
- Credit notes are GST-compliant and auditable

5. Administration

5.1 User & Role Management

Manage users, assign roles, and configure granular permissions across 36 system screens.

Creating a New User

- Step 1:** Navigate to "User Management" (Admin only)
- Step 2:** Click "Add User" button
- Step 3:** Fill user information:

- Full Name
- Username - Unique identifier for login
- Email Address
- Password - Must meet security requirements
- Role - Admin/Manager/Operator/Reviewer

Step 4: Select department (if applicable)

Step 5: Click "Create User"

& Password Requirements:

- Minimum 8 characters
- At least one uppercase letter
- At least one number
- At least one special character (@, #, \$, etc.)

Managing Role Permissions

Step 1: Navigate to "Role Management"

Step 2: Click on role to view/edit permissions

Step 3: Review 36 system screens with permissions:

- View Only - Can see but not modify
- Edit - Can create, modify, delete
- No Access - Cannot see at all

Step 4: Check/uncheck permissions as needed

Step 5: Click "Save Role Permissions"

' Default Role Permissions:

- Admin - Full access to all 36 screens
- Manager - Access to operations, reports, no user management
- Operator - Production, checklists, basic inventory
- Reviewer - Checklist reviews and approvals only

Deactivating/Reactivating Users

Step 1: Find user in User Management list

Step 2: Click "Deactivate" button

- User cannot log in but data remains
- Historical records still show user name

Step 3: To reactivate, click "Activate" button

& Note: You cannot delete your own account for security reasons.

5.2 Notification Configuration

Configure WhatsApp and email notifications for machine startups and missed checklists.

Configuring WhatsApp Notifications

- Step 1:** Navigate to "Notification Settings"
- Step 2:** Go to "WhatsApp Configuration" tab
- Step 3:** Enter Twilio credentials (provided by admin):
- Account SID
 - Auth Token
 - WhatsApp Number
- Step 4:** Configure notification templates
- Step 5:** Test notification by sending test message
- Step 6:** Click "Save Configuration"

Configuring Email Notifications

- Step 1:** Go to "Email Configuration" tab
- Step 2:** Enter email server details:
- SMTP Server
 - Port Number
 - Sender Email Address
 - SMTP Username and Password
- Step 3:** Configure email templates
- Step 4:** Send test email to verify setup
- Step 5:** Click "Save Configuration"

Notification Types

- Machine Startup Reminders - Before shift start time
- Missed Checklist Notifications - After due time
- Production Alerts - High variance notifications
- Quality Approval Alerts - QA checklist approvals

6. Reporting & Analytics

6.1 Available Reports

Comprehensive reporting system with Excel and PDF export capabilities.

Accessing Reports

Step 1: Navigate to "Reports" from left menu

Step 2: Select report type from list:

Production Reports:

- Raw Material Issuance Report
- Production Entry Report
- Production Reconciliation Report
- Variance Analysis Report

Sales & Finance Reports:

- Sales Invoice Report
- Dispatch Tracking Report
- Payment Collection Report
- Pending Payments Report
- Credit Notes Report

Quality Reports:

- QA Checklist Execution Report
- Preventive Maintenance Report
- Machine Startup Compliance Report

Inventory Reports:

- Raw Material Stock Report
- Finished Goods Inventory Report
- Purchase Order Report

Generating a Report

Step 1: Select report type

Step 2: Choose date range:

- Today
- Last 7 Days
- Last 30 Days
- This Month
- Custom Date Range

Step 3: Apply additional filters (if available):

- Product
- Machine
- Operator
- Status

Step 4: Click "Generate Report"

Step 5: View report on screen

Step 6: Export to Excel or PDF:

7. Troubleshooting Guide

Common issues and their solutions.

Issue: Cannot log in

Solution:

- Verify username/email is correct
- Check Caps Lock is not on
- Contact admin if password is forgotten
- Ensure account is not deactivated

Issue: "Permission Denied" error

Solution:

- Your role may not have access to this screen
- Contact admin to grant permissions
- Log out and log back in to refresh permissions

Issue: Stock shows as insufficient

Solution:

- Check current stock levels in Inventory Management
- Verify no pending gatepasses that consumed stock
- Create purchase order if genuinely out of stock
- Contact admin if stock numbers seem incorrect

Issue: BOM auto-populate not working

Solution:

- Ensure product has BOM defined in Product Master
- Check all BOM items have valid quantities
- Verify product is active and not disabled
- Refresh page and try again

Issue: WhatsApp notifications not received

Solution:

- Verify mobile number is correct in user profile
- Check WhatsApp configuration is saved properly
- Ensure Twilio account has sufficient credits
- Contact admin to verify Twilio setup

Issue: Report shows no data

Solution:

- Check date range includes actual transaction dates
- Remove filters that may be too restrictive
- Verify data exists for selected criteria
- Try "All Time" date range to test

Issue: Cannot complete reconciliation

Solution:

- Ensure production entry exists first
- Check 24-hour edit window has not expired (if Operator)
- Verify returned quantity does not exceed issued quantity
- Contact Manager for help if needed

Issue: GST calculations seem incorrect

Solution:

- Verify customer GSTIN is correctly entered
- Check if customer is in same state (CGST+SGST) or different state (IGST)
- Ensure product prices are configured as inclusive/exclusive correctly
- Contact admin to verify GST configuration

Still Need Help?

If you cannot resolve an issue using this guide:

- Contact your system administrator
- Send email with screenshot of error message
- Include what you were trying to do when error occurred
- Note the date and time of the issue

Quick Reference Card

Daily Operations Checklist

- Log in to system at shift start
- Check for assigned QA checklists
- Respond to machine startup reminders
- Record raw material issuances
- Enter production outputs as they complete
- Complete end-of-shift reconciliation
- Review any pending approvals (if Reviewer/Manager)
- Check pending payments (if Finance role)
- Log out at shift end

Critical Rules to Remember

- Never share your password with anyone
- Always save work before navigating away
- Check stock availability before issuing materials
- Complete reconciliations within 24 hours (Operators)
- Upload photos for failed checklist items
- Verify gatepass details before printing

End of User Manual