

# KINTO

## Smart Ops

Complete End User Manual

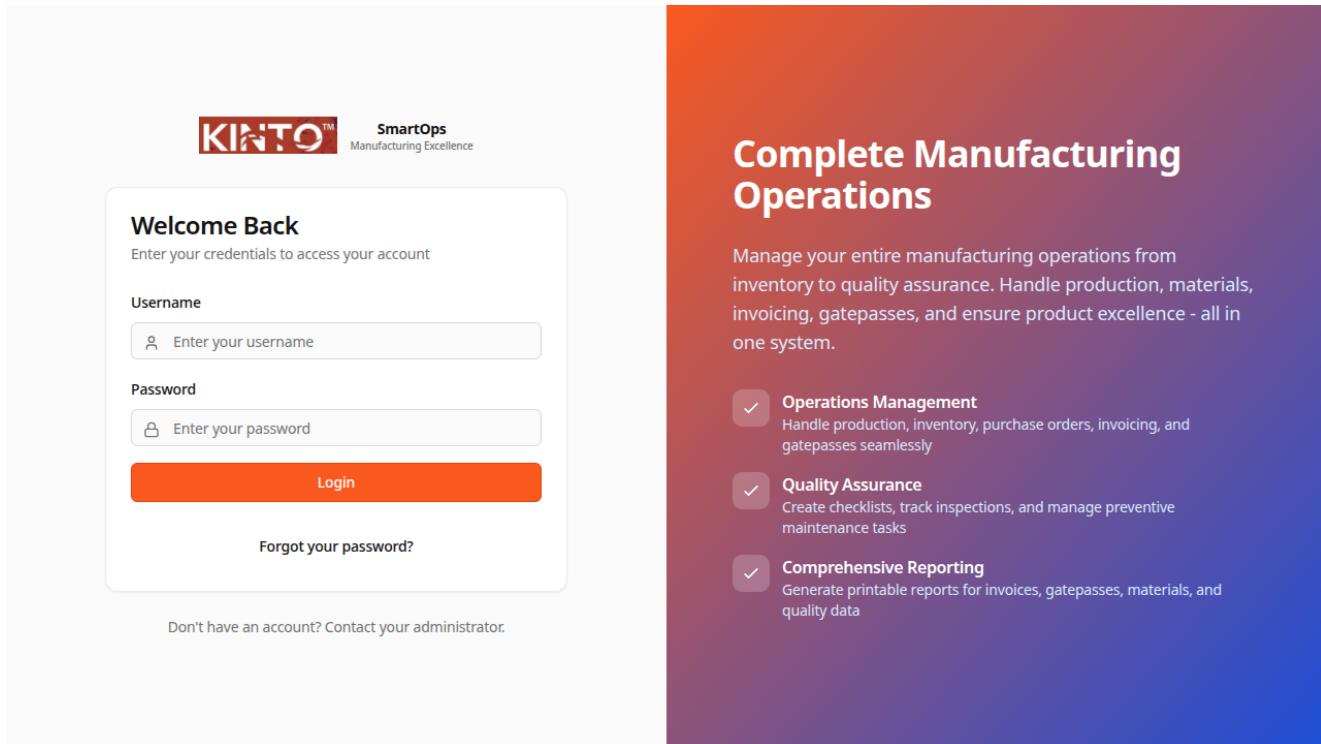
24 Workflows with Detailed Instructions & Screenshots

# 1. Getting Started

## 1.1 System Login

KINTO Smart Ops uses secure email/password authentication. All users must have valid credentials assigned by system administrators.

1. Navigate to the KINTO Smart Ops application URL in your web browser
2. Enter your username or email address in the login field
3. Enter your password securely
4. Click the "Sign In" button to access the system



Screenshot: KINTO Smart Ops Login Screen

**INFO:** Contact your system administrator if you forget your password or need access.

## 1.2 Dashboard Overview

After successful login, you will see your role-based dashboard. The dashboard provides quick access to all features relevant to your role and displays important notifications and alerts.

Overview Dashboard
Sales Dashboard
Reports
CONFIGURATION

Users
Role Permissions
Machines
Machine Types
Spare Parts
PM Templates
Invoice Templates
Unit of Measurement
Vendor Master

## Dashboard Overview

Monitor your QA system at a glance

Total Users

**19**

19 with assigned roles

Active Machines

**7**

7 total machines

Checklist Templates

**6**

Ready to use

Low Stock Alerts

**5**

10 parts total

### + Quick Actions

Common administrative tasks

Add New User

Create user account and assign role

Configure Machine

Add or update machine settings

Build Checklist

Create quality inspection checklist

Schedule Maintenance

Plan preventive maintenance task

### ⌚ Recent Activity

Latest system updates

New user registered

2 hours ago

RFC Machine status updated

5 hours ago

Daily inspection checklist completed

1 day ago

PM task scheduled for next week

2 days ago

[View All Activity](#)

### ⚠ Inventory Alerts

5 spare parts are running low on stock

Review inventory and generate purchase orders to avoid stockouts

[View Parts](#)

### System Status

Current operational status

Active Machines

7 operational

PM Schedules

0 active plans

Checklists

6 templates ready

### Today's Production Summary

Raw Material Issued
**7**
Gatepasses Issued
**3**
Invoices Created
**0**
Current Stock
**925**

units

### ₹ Pending Payments

3 invoices with outstanding payments

Total Outstanding

**₹5916400.00**

Invoice Number	Date	Customer	Total Amount	Paid	Outstanding	Status	Actions
INV-SAMPLE-001	01-Jan-1970	ABC Distributors Pvt Ltd	₹10500.00	₹0.00	₹10500.00	Unpaid	
INV-1762693203842	01-Jan-1970	XYZ Industries Test Automation	₹5900000.00	₹0.00	₹5900000.00	Unpaid	
INV-1762706022935	01-Jan-1970	Test Customer U-Gv	₹5900.00	₹0.00	₹5900.00	Unpaid	

### Inventory Summary

Real-time inventory levels and alerts

### ⚠ Low Stock Alerts

1 material(s) require immediate attention

Aluminum Sheet 3mm

RM-0002

Critical

## 1.3 Navigation Menu

The sidebar navigation provides organized access to all system modules. Click on any menu item to access that feature. Your available menu items depend on your assigned role and permissions.

[Overview Dashboard](#)[Sales Dashboard](#)[Reports](#)

## CONFIGURATION

[Users](#)[Role Permissions](#)[Machines](#)[Machine Types](#)[Spare Parts](#)[PM Templates](#)[Invoice Templates](#)[Unit of Measurement](#)[Vendor Master](#)

## Dashboard Overview

Monitor your QA system at a glance

Total Users

**19**

19 with assigned roles

Active Machines

**7**

7 total machines

Checklist Templates

**6**

Ready to use

Low Stock Alerts

**5**

10 parts total

## + Quick Actions

Common administrative tasks

[Add New User](#)

Create user account and assign role

[Configure Machine](#)

Add or update machine settings

[Build Checklist](#)

Create quality inspection checklist

[Schedule Maintenance](#)

Plan preventive maintenance task



## Recent Activity

Latest system updates

[New user registered](#)

2 hours ago

[RFC Machine status updated](#)

5 hours ago

[Daily inspection checklist completed](#)

1 day ago

[PM task scheduled for next week](#)

2 days ago

[View All Activity](#)

## ⚠ Inventory Alerts

5 spare parts are running low on stock

Review inventory and generate purchase orders to avoid stockouts

[View Parts](#)

## System Status

Current operational status

[Active Machines](#)

7 operational

[PM Schedules](#)

0 active plans

[Checklists](#)

6 templates ready

## Today's Production Summary



Raw Material Issued

**7**

Gatepasses Issued

**3**

Invoices Created

**0**

Current Stock

**925**

units

## ₹ Pending Payments

3 invoices with outstanding payments

Total Outstanding

**₹5916400.00**

Invoice Number	Date	Customer	Total Amount	Paid	Outstanding	Status	Actions
INV-SAMPLE-001	01-Jan-1970	ABC Distributors Pvt Ltd	₹10500.00	₹0.00	₹10500.00	Unpaid	
INV-1762693203842	01-Jan-1970	XYZ Industries Test Automation	₹5900000.00	₹0.00	₹5900000.00	Unpaid	
INV-1762706022935	01-Jan-1970	Test Customer U-Gv	₹5900.00	₹0.00	₹5900.00	Unpaid	

## Inventory Summary

Real-time inventory levels and alerts

## ⚠ Low Stock Alerts

1 material(s) require immediate attention

Aluminum Sheet 3mm

RM-0002

Critical

Current: 0

Max: N/A

#### Screenshot: Sidebar Navigation Menu

**TIP:** Your visible menu items are determined by your role and permissions configured by administrators.

# 2. Quality Assurance Workflows

## 2.1 QA Checklist Management

QA Checklists ensure consistent quality control procedures across all machines and shifts. Operators complete checklists documenting checks, measurements, and observations for each machine shift.

### Accessing QA Checklists

1. Click "QA Checklists" in the sidebar navigation
2. View the list of available checklists and submissions
3. Check submission status (Pending, In Review, Approved, Rejected)
4. Filter checklists by machine, shift, date, or status

Screenshot: QA Checklists List View

### Creating a New Checklist Submission

1. Click "New Submission" button on the QA Checklists page
2. Select the machine from the dropdown menu
3. Select the shift (Morning, Afternoon, Night)
4. Choose the date for the checklist
5. Complete all required checklist items sequentially
6. For each item, enter measurements, observations, or select pass/fail
7. Add photos if required by the checklist item
8. Review all entries for accuracy
9. Click "Submit for Review" when complete

**WARNING:** All checklist items must be completed before submission. Items marked in red are required and incomplete.

## 2.2 Reviewer Dashboard

The Reviewer Dashboard allows designated reviewers to verify submitted checklists, approve or request

corrections, and track team performance metrics.

## Reviewing Submissions

1. Access "Reviewer Dashboard" from the sidebar
2. View pending submissions in the submissions list
3. Click on a submission to review complete details
4. Verify all checklist items are correctly completed
5. Check attached photos for quality and relevance
6. Review operator notes and observations
7. Either approve the submission or request corrections
8. Add reviewer comments explaining approval or correction requests
9. Submit the review decision

The screenshot shows the KINTO SmartOps Reviewer Dashboard. On the left, there's a sidebar with navigation links: Raw Material Types, Notification Settings, PRODUCTION (with Product Master, Product Categories, Product Types), and Checklist Builder (which is highlighted with an orange background). Below PRODUCTION are Raw Materials and Finished Goods. Under OPERATIONS are Maintenance and PM History. At the bottom of the sidebar are Purchase Orders. The main area is titled 'Checklist Builder'. It has fields for 'Checklist Name' (e.g., RFC Machine Daily Checklist) and 'Assign to Machine (Optional)' (None (General Checklist)). Below this is a 'Tasks' section with a 'Task Name' field (e.g., Clean the Machine) and a 'Verification Criteria' field (e.g., Wipe down surfaces and remove any spills). At the bottom right of the main area are 'Save Checklist' and 'Clear Form' buttons.

Screenshot: Reviewer Dashboard

**INFO:** Rejected submissions return to the operator with your comments for correction and resubmission.

## 2.3 Preventive Maintenance

Preventive Maintenance (PM) schedules ensure equipment reliability and minimize unexpected breakdowns. The system tracks PM schedules, execution records, and compliance.

### Executing Preventive Maintenance

1. Navigate to "Preventive Maintenance" from the sidebar
2. View scheduled PM tasks with due dates
3. Identify overdue tasks (highlighted in red)
4. Click "Execute PM" for the task to be performed
5. Complete all maintenance steps as per the PM checklist
6. Record observations, measurements, and conditions found
7. Document spare parts used during maintenance
8. Note any issues or anomalies discovered
9. Upload photos of completed work if required
10. Mark the PM task as complete

## 11. System automatically schedules the next PM occurrence

The screenshot shows the KINTO SmartOps software interface. At the top left is the KINTO logo and the text "SmartOps Manufacturing Excellence". At the top right are icons for notifications and sharing. The main menu on the left includes "Raw Material Types", "Notification Settings", "PRODUCTION" (expanded to show "Product Master", "Product Categories", "Product Types", "Checklist Builder", "Raw Materials", and "Finished Goods"), and "OPERATIONS" (expanded to show "Maintenance" which is highlighted in an orange box, "PM History", and "Purchase Orders"). In the center, under the heading "Preventive Maintenance", there is a button labeled "+ Schedule PM".

Screenshot: Preventive Maintenance Schedule

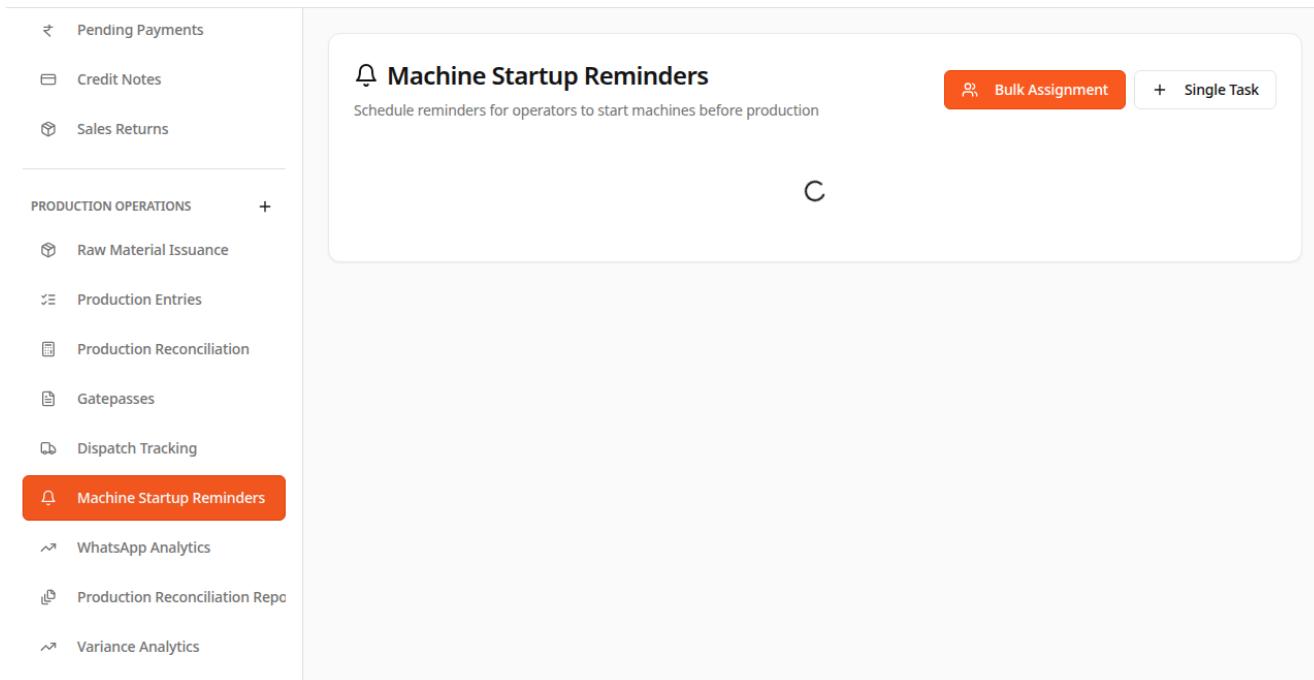
**WARNING:** Complete overdue PM tasks as soon as possible to maintain equipment reliability and avoid compliance issues.

## 2.4 Machine Startup Reminders

Machine Startup Reminders ensure operators complete critical startup checklists before beginning production, preventing equipment damage and ensuring safe operations.

### Responding to Startup Reminders

1. Navigate to "Machine Startup Reminders"
2. View machines requiring startup checklists
3. Click on a machine to view startup checklist
4. Complete all pre-startup inspection items
5. Verify safety systems are functional
6. Check fluid levels, pressures, temperatures as required
7. Document any issues or abnormalities found
8. Mark startup checklist as complete
9. Acknowledge reminder to begin production



The screenshot shows the KINTO Smart Ops dashboard. On the left, there's a sidebar with several categories: Pending Payments, Credit Notes, Sales Returns, PRODUCTION OPERATIONS (which is expanded to show Raw Material Issuance, Production Entries, Production Reconciliation, Gatepasses, Dispatch Tracking, and Machine Startup Reminders), WhatsApp Analytics, Production Reconciliation Repo, and Variance Analytics. The 'Machine Startup Reminders' item is highlighted with an orange box. The main content area has a header 'Machine Startup Reminders' with a bell icon, a sub-header 'Schedule reminders for operators to start machines before production', and two buttons: 'Bulk Assignment' (orange) and '+ Single Task'.

Screenshot: Machine Startup Reminders

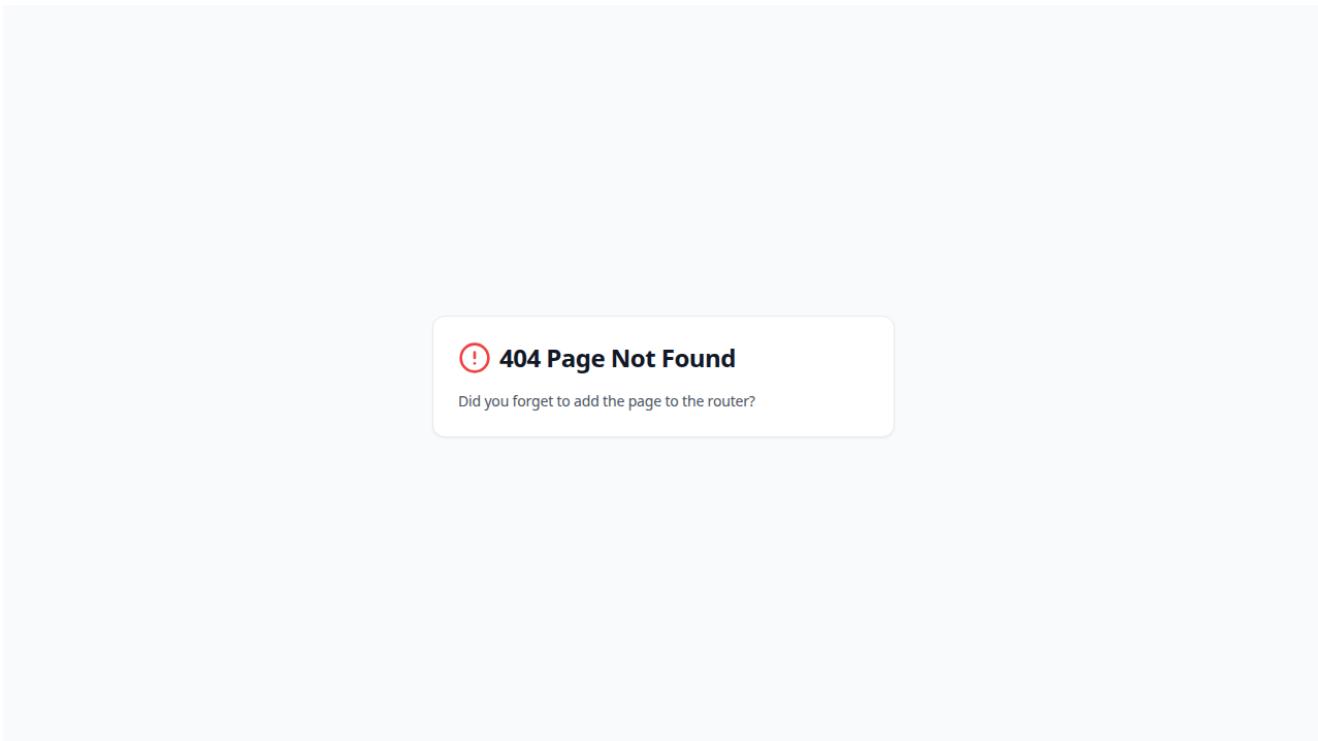
# 3. Production Management Workflows

## 3.1 Product Master Management

The Product Master maintains comprehensive definitions for all manufactured products, including specifications, units of measure, and Bills of Materials (BOM).

### Viewing Products

1. Click "Product Master" in the sidebar
2. Browse the list of all products
3. Use search to find specific products by code or name
4. Filter by product category or type
5. Click on a product to view complete details



Screenshot: Product Master List

### Adding a New Product

1. From Product Master page, click "Add Product" button
2. Enter unique product code
3. Enter product name and description
4. Select product category from dropdown
5. Select product type from dropdown
6. Enter technical specifications
7. Define unit of measure (Pieces, Kg, Liters, etc.)
8. If applicable, define Bill of Materials (BOM) specifying raw materials required
9. Enter quantity of each raw material per unit of finished product
10. Save the product definition

	TEST-UKhka7	Test Product 4FP7kz	Hydraulic Components	Pieces	₹100000	<span>Active</span>	<span>Edit</span>	<span>Delete</span>
	TEST-YAP	Test Product YAP	Test Category	Kilograms - Edited	₹100	<span>Active</span>	<span>Edit</span>	<span>Delete</span>
	PROD-ax4O	Test Product qN9	Test Category	Kilograms - Edited	₹5	<span>Active</span>	<span>Edit</span>	<span>Delete</span>
	PROD-CN-001	Test Product CN	-	-	-	<span>Active</span>	<span>Edit</span>	<span>Delete</span>

Previous | Page 1 of 2 | Next

Screenshot: Product Entry Form

**SUCCESS:** The Bill of Materials (BOM) is critical for automatic raw material calculation during production planning.

## 3.2 Inventory Management

Track raw materials and finished goods inventory in real-time. Monitor stock levels, view transaction history, and identify reorder requirements.

### Monitoring Inventory

1. Access "Inventory Management" from the sidebar
2. Switch between Raw Materials and Finished Goods tabs
3. View current stock levels for all items
4. Identify low stock items (highlighted in red)
5. Check reorder points and recommended reorder quantities
6. View complete transaction history for any item
7. Filter by location, category, or status
8. Generate inventory reports for analysis

- ↳ Invoice Templates
- ↳ Unit of Measurement
- ↳ Vendor Master
- ↳ Raw Material Types
- ↳ Notification Settings

---

PRODUCTION +

- ↳ Product Master
- ↳ Product Categories
- ↳ Product Types
- ↳ Checklist Builder
- ↳ Raw Materials
- ↳ Finished Goods

---

SALES & PURCHASES

## Inventory Management

Manage units, products, raw materials, and finished goods

+ Add Product

Product Code	Name	Category	UOM	Standard Cost	Status	Actions
HC-500	Test Hydraulic Cylinder HC-500	-	Units	₹500000	<span style="background-color: #ccc; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">Inactive</span>	<span style="color: #ccc;">edit</span> <span style="color: #ccc;">trash</span>
TEST-HC-500	Test Hydraulic Cylinder HC-500	-	Units	-	<span style="background-color: #f08040; border: 1px solid #f08040; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: #f08040;">edit</span> <span style="color: #f08040;">trash</span>
TEST-HC-500_ytAzy	Test Hydraulic Cylinder HC-500	-	Units	-	<span style="background-color: #f08040; border: 1px solid #f08040; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: #f08040;">edit</span> <span style="color: #f08040;">trash</span>
PROD-m5w8-q	BOM Test PROD-m5w8-q	-	-	-	<span style="background-color: #f08040; border: 1px solid #f08040; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: #f08040;">edit</span> <span style="color: #f08040;">trash</span>
PROD-DukbgB	No BOM PROD-DukbgB	-	-	-	<span style="background-color: #f08040; border: 1px solid #f08040; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: #f08040;">edit</span> <span style="color: #f08040;">trash</span>
WB-1L	Mineral Water Bottle 1L	Finished Goods	Pieces	₹2000	<span style="background-color: #f08040; border: 1px solid #f08040; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: #f08040;">edit</span> <span style="color: #f08040;">trash</span>
TEST-UKhka7	Test Product 4FP7kz	Hydraulic Components	Pieces	₹100000	<span style="background-color: #f08040; border: 1px solid #f08040; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: #f08040;">edit</span> <span style="color: #f08040;">trash</span>
TEST-YAP	Test Product YAP	Test Category	Kilograms - Edited	₹100	<span style="background-color: #f08040; border: 1px solid #f08040; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: #f08040;">edit</span> <span style="color: #f08040;">trash</span>
PROD-ax4O	Test Product qN9	Test Category	Kilograms - Edited	₹5	<span style="background-color: #f08040; border: 1px solid #f08040; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: #f08040;">edit</span> <span style="color: #f08040;">trash</span>
PROD-CN-001	Test Product CN	-	-	-	<span style="background-color: #f08040; border: 1px solid #f08040; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: #f08040;">edit</span> <span style="color: #f08040;">trash</span>

Previous
Page 1 of 2
Next

Screenshot: Inventory Management Dashboard

- ↳ Invoice Templates
- ↳ Unit of Measurement
- ↳ Vendor Master
- ↳ Raw Material Types
- ↳ Notification Settings

---

PRODUCTION +

- ↳ Product Master
- ↳ Product Categories
- ↳ Product Types
- ↳ Checklist Builder
- ↳ Raw Materials
- ↳ Finished Goods

---

### Inventory Management

Manage units, products, raw materials, and finished goods

+ Add Raw Material

Material Code	Name	Category	Base Unit	Conversion	Stock	Status	Actions
RM-0002	Aluminum Sheet 3mm	Other	-	None	0	<span style="background-color: orange; color: white; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: orange;">✎</span> <span style="color: orange;">trash</span>
RM-0005	AutoFetch Test omY13t	-	-	None	100	<span style="background-color: orange; color: white; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: orange;">✎</span> <span style="color: orange;">trash</span>
RM-0003	Copper Wire 2.5mm	-	-	None	700	<span style="background-color: orange; color: white; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: orange;">✎</span> <span style="color: orange;">trash</span>
RM-0004	Plastic Granules PVC	Preform	-	None	1150	<span style="background-color: orange; color: white; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: orange;">✎</span> <span style="color: orange;">trash</span>
BATCH-1Fed	Test Material Wqi	Test Category	-	None	1350	<span style="background-color: orange; color: white; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: orange;">✎</span> <span style="color: orange;">trash</span>
RM-f7RUpy	Steel Rod WA9p	Raw Metal5005050Warehouse ATest Supplier	-	None	200	<span style="background-color: orange; color: white; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: orange;">✎</span> <span style="color: orange;">trash</span>
RM-ET4	Test Material ET4	-	-	None	1500	<span style="background-color: orange; color: white; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: orange;">✎</span> <span style="color: orange;">trash</span>
RM-0001	Steel Plate 5mm	Other	-	None	1817	<span style="background-color: orange; color: white; border-radius: 5px; padding: 2px 5px;">Active</span>	<span style="color: orange;">✎</span> <span style="color: orange;">trash</span>

Screenshot: Raw Materials Inventory Tab

## 3.3 Raw Material Type Master

Define raw material specifications, units of measure, and conversion factors to ensure accurate inventory tracking and consumption calculations.

### Managing Raw Material Types

1. Navigate to "Raw Material Types" in the sidebar
2. Click "Add Type" to create a new material definition
3. Enter unique material code
4. Enter material name and description
5. Define base unit of measure (Kg, Liters, Meters, etc.)
6. Set conversion factors if material is measured in multiple units
7. Define quality parameters or specifications if applicable
8. Set loss percentage for manufacturing calculations
9. Save the material type definition

↳ Invoice Templates  
↳ Unit of Measurement  
↳ Vendor Master  
Raw Material Types  
🔔 Notification Settings
 
📦 Raw Material Type Master

Define raw material types with conversion methods for inventory management

+ Add Type

Type Code	Type Name	Conversion Method	Base Unit	Conversion Details	Usable Units	Status	Actions
RMT-003	Preform 21g	Formula-Based	Bag (25)	Piece: 1190 pcs 25kg × 1000 ÷ 21g	1131 (95%)	Active	<span style="font-size: small;">✎</span> <span style="font-size: small;">trash</span>
RMT-004	Cap Standard	Direct-Value	Box	Piece: 7000 pcs	6790 (97%)	Active	<span style="font-size: small;">✎</span> <span style="font-size: small;">trash</span>
RMT-005	Label Roll	Output-Coverage	Roll	Bottle: 5000 units	4900 (98%)	Active	<span style="font-size: small;">✎</span> <span style="font-size: small;">trash</span>
RMT-001	Preform 21g	Formula-Based	Bag (25)	Piece: 1190 pcs 25kg × 1000 ÷ 21g	1107 (93%)	Active	<span style="font-size: small;">✎</span> <span style="font-size: small;">trash</span>
RMT-006	Plastic Pellets	Formula-Based	Kg (25)	Piece: 25 pcs 25kg × 1000 ÷ 1000g	25 (98%)	Active	<span style="font-size: small;">✎</span> <span style="font-size: small;">trash</span>
RMT-007	Test Material	Formula-Based	Bag (25)	Piece: 25 pcs 25kg × 1000 ÷ 1000g	25 (98%)	Active	<span style="font-size: small;">✎</span> <span style="font-size: small;">trash</span>
RMT-008	Quick Test Material	Formula-Based	Bag (25)	Piece: 25 pcs 25kg × 1000 ÷ 1000g	25 (98%)	Active	<span style="font-size: small;">✎</span> <span style="font-size: small;">trash</span>
RMT-009	Test Bag Conversion 2MSPGO	Formula-Based	Bag (50)	Piece: 25 pcs 50kg × 1000 ÷ 2000g	23 (90%)	Active	<span style="font-size: small;">✎</span> <span style="font-size: small;">trash</span>

Screenshot: Raw Material Types Master

## 3.4 Material Issuances

Issue raw materials for production based on product Bills of Materials. The system automatically calculates required quantities based on planned production.

### Creating Material Issuance

1. Click "Material Issuances" in the sidebar
2. Create new issuance record
3. Select the product to be produced
4. Enter planned production quantity
5. System automatically calculates required raw materials from BOM
6. Review auto-calculated material requirements
7. Adjust quantities if needed (system records variance)
8. Select shift and machine
9. Add any notes or special instructions
10. Submit the material issuance
11. System automatically deducts materials from inventory
12. Print issuance slip for shop floor reference

**FINANCE & SALES**

- \$ Sales Invoices
- ₹ Pending Payments
- ✉ Credit Notes
- 📦 Sales Returns

---

**PRODUCTION OPERATIONS**

- Raw Material Issuance
- ☰ Production Entries
- 📋 Production Reconciliation
- 📄 Gatepasses
- 🚚 Dispatch Tracking
- 🔔 Machine Startup Reminders
- ↗️ WhatsApp Analytics

## Production Management

Manage raw material issuance and gatepasses

### Raw Material Issuance

+ Issue Material

Issuance No.	Date	For Product	Issued To	Issued By	Remarks	Actions
ISS-176274863280	Nov 10, 2025	N/A	Production Line Test o12	admin_test	-	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">🖨️ Print</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">📝 Edit</span> <span style="color: red; font-size: 1.2em;">✖</span>
ISS-1763007505274	Nov 13, 2025	TEST-BOM-001 - Test Water Bottle 1L (BOM Sample)	UOM Fix Test Production	testadmin	-	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">🖨️ Print</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">📝 Edit</span> <span style="color: red; font-size: 1.2em;">✖</span>
ISS-1763030083359	Nov 13, 2025	N/A	Test Operator	admin	Variance test issuance	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">🖨️ Print</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">📝 Edit</span> <span style="color: red; font-size: 1.2em;">✖</span>
ISS-1763030819798	Nov 13, 2025	N/A	Variance Test Operator	admin	-	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">🖨️ Print</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">📝 Edit</span> <span style="color: red; font-size: 1.2em;">✖</span>
ISS-1763031377697	Nov 13, 2025	FINAL-Qpv - Final Test	Final Test Operator	admin	-	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">🖨️ Print</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">📝 Edit</span> <span style="color: red; font-size: 1.2em;">✖</span>
ISS-1763034115116	Nov 13, 2025	N/A	Final Test	admin	-	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">🖨️ Print</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">📝 Edit</span> <span style="color: red; font-size: 1.2em;">✖</span>
ISS-1763035140883	Nov 13, 2025	N/A	Test Deduction	admin	-	<span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">🖨️ Print</span> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-right: 5px;">📝 Edit</span> <span style="color: red; font-size: 1.2em;">✖</span>

Screenshot: Material Issuance Records

**SUCCESS:** BOM-driven issuance ensures accurate material consumption tracking and variance analysis.

## 3.5 Production Entry

Record actual production output by shift and machine. The system compares actual vs planned production and automatically calculates variances for analysis.

### Recording Production

1. Access "Production Entries" from the sidebar
2. Create new production entry
3. Select shift (Morning, Afternoon, Night)
4. Select machine where production occurred
5. Link to the corresponding material issuance
6. Enter actual quantity produced (finished goods)
7. Record any rejected or defective units
8. Document waste or scrap generated
9. Add production notes or observations
10. Save the production entry
11. System automatically calculates production efficiency
12. System compares actual vs planned and shows variance percentage

**FINANCE & SALES**

- \$ Sales Invoices
- ₹ Pending Payments
- ✉ Credit Notes
- 📦 Sales Returns

---

**PRODUCTION OPERATIONS**

- 📦 Raw Material Issuance
- ☰ Production Entries
- 📋 Production Reconciliation
- 📄 Gatepasses
- 🚚 Dispatch Tracking
- 🔔 Machine Startup Reminders
- ↗️ WhatsApp Analytics

## Production Entries

Track actual production output and compare against raw material issuances

Total Entries
4
Total Produced
340.00
Total Rejected
0.00

Production Date	Shift	Issuance	Produced	Rejected	Derived Units	Actions
11/13/2025	Shift A	ISS-1763030083359	85.00	0.00	N/A	<span style="color: #ff7f0e;">🔗</span>
11/13/2025	Shift A	ISS-1763030819798	85.00	0.00	N/A	<span style="color: #ff7f0e;">🔗</span>
11/13/2025	Shift A	ISS-1763007505274	85.00	0.00	N/A	<span style="color: #ff7f0e;">🔗</span>
11/13/2025	Shift A	ISS-1762748633280	85.00	0.00	N/A	<span style="color: #ff7f0e;">🔗</span>

Screenshot: Production Entry List

**INFO:** Accurate production entry is essential for inventory management and performance analysis.

## 3.6 Production Reconciliation

End-of-day reconciliation closes the loop between raw materials issued, production output, and actual material consumption. This ensures inventory accuracy and identifies variances.

### Performing Production Reconciliation

1. Navigate to "Production Reconciliation"
2. Select the production entry to reconcile
3. Review raw materials issued (from material issuance)
4. Review actual production output recorded
5. Enter actual quantity of each raw material consumed
6. System calculates returned/unused materials automatically
7. Review variance between issued and consumed quantities
8. Add reconciliation notes explaining any significant variances
9. Submit the reconciliation
10. System automatically updates inventory with returned materials
11. Audit trail records all adjustments for tracking

The screenshot shows the 'Production Reconciliation' section of the KINTO Smart Ops interface. On the left sidebar under 'PRODUCTION OPERATIONS', 'Production Reconciliation' is highlighted with an orange box. The main area displays three summary cards: 'Total Reconciliations' (0), 'Today's Reconciliations' (0), and 'Shifts Covered' (0). Below these is a section titled 'Reconciliation Records' with a sub-instruction 'View and manage material usage reconciliation entries'. A progress message 'Loading reconciliations...' is visible in this section.

Screenshot: Production Reconciliation

**WARNING:** Daily reconciliation ensures inventory accuracy and helps identify material usage issues promptly.

## 3.7 Variance Analytics Dashboard

Advanced analytics dashboard providing trend analysis of production efficiency and material usage variances across various time periods. Visualize performance metrics with interactive charts.

### Using Variance Analytics

1. Access "Variance Analytics" from the sidebar
2. Select time period for analysis (Daily, Weekly, Monthly)
3. View key metrics: Production Efficiency, Material Usage Variance, Waste Percentage
4. Analyze trend charts showing performance over time
5. Identify patterns in production efficiency
6. Spot material wastage trends
7. Compare performance across machines or shifts
8. Export analytics data for detailed reporting
9. Use insights to improve production processes

- ⌚ Pending Payments
- ✉️ Credit Notes
- 📦 Sales Returns

## PRODUCTION OPERATIONS +

- 📦 Raw Material Issuance
- 📅 Production Entries
- 📋 Production Reconciliation
- 📄 Gatepasses
- 🚚 Dispatch Tracking
- 🔔 Machine Startup Reminders
- ↗️ WhatsApp Analytics
- 📊 Production Reconciliation Repo

[Variance Analytics](#)

## Variance Analytics

Analyze production variance trends and efficiency metrics over time

### Period Selection

Time Period	Year
Monthly	2025

Total Reconciliations	Avg Variance	Avg Efficiency	Avg Yield
2	0.00%	0.00%	0.00%

Monthly analysis Within acceptable range Production efficiency Production yield

Good	Warning	Critical
2	0	0

Variance ≤ 2% Variance 2-5% Variance > 5%

### Variance Trend

Average variance percentage over time



### Efficiency & Yield Trends

Production performance metrics over time



### Status Distribution

Good, Warning, and Critical reconciliations by period



Screenshot: Variance Analytics Dashboard

# 4. Sales & Finance Workflows

## 4.1 Sales Dashboard

Comprehensive overview of sales performance, revenue trends, top customers, and outstanding payments. Monitor key sales metrics at a glance.

### Using Sales Dashboard

1. Access "Sales Dashboard" from the sidebar
2. View total revenue for selected period
3. Monitor pending payments and overdue amounts
4. Check top customers by revenue
5. Review recent invoices and their status
6. Analyze sales trends with graphical charts
7. Quick access to create new invoice or record payment

The screenshot shows the KINTO SmartOps Sales Dashboard. On the left, a sidebar menu includes 'Overview Dashboard', 'Sales Dashboard' (which is highlighted in orange), 'Reports', and configuration options like 'Users', 'Role Permissions', 'Machines', etc. The main dashboard area has a title 'Sales Dashboard' and a subtitle 'Track your sales performance and revenue'. It features four cards: 'Total Revenue' (\$₹0.00, Turnover for 2025), 'Goods Sold' (0, Total units sold), 'Total Orders' (0, Total invoices generated), and 'Avg Order Value' (\$₹0.00, Per invoice). Below these is a section titled 'Monthly Breakdown' with the subtitle 'Detailed sales metrics for 2025'. It contains a large cube icon and the message 'No Sales Data' followed by 'No invoices found for 2025'.

Screenshot: Sales Dashboard Overview

## 4.2 Sales Invoice Management

Create GST-compliant invoices, manage customer billing, track payment status, and maintain complete invoicing records.

### Creating Sales Invoices

1. Click "Sales Invoices" in the sidebar
2. Create new invoice
3. Select customer from customer master
4. Enter invoice date and due date
5. Add invoice line items (products)
6. Enter quantity and rate for each product
7. System automatically calculates CGST, SGST, or IGST based on customer state

8. Review total amount including taxes
9. Add any additional charges or discounts
10. Preview invoice before saving
11. Generate and save the invoice
12. Print invoice or send electronically to customer
13. Invoice automatically appears in dispatch tracking

**KINTO™ SmartOps** Manufacturing Excellence

OPERATIONS
+ Maintenance
PM History
Purchase Orders

FINANCE & SALES
+ Sales Invoices
Pending Payments
Credit Notes
Sales Returns

PRODUCTION OPERATIONS
+ Raw Material Issuance
Production Entries

### Production Management

Manage raw material issuance and gatepasses

#### Sales Invoices

Invoice #	Date	Buyer Name	Status	Total	Paid	Outstanding	Actions
INV-SAMPLE-001	01 Jan 1970	ABC Distributors Pvt Ltd	Dispatched	₹10500.00	₹0.00	₹10500.00	\$ <a href="#">Print / Download PDF</a> <small>(Click to print or save as PDF)</small>
INV-1763008388849	01 Jan 1970	AutoTest Vendor	Ready for GP	₹29500.00	₹29500.00	₹0.00	\$ <a href="#">Print / Download PDF</a> <small>(Click to print or save as PDF)</small>
INV-1762693203842	01 Jan 1970	XYZ Industries Test Automation	Delivered	₹5900000.00	₹0.00	₹5900000.00	\$ <a href="#">Print / Download PDF</a> <small>(Click to print or save as PDF)</small>
INV-1762706022935	01 Jan 1970	Test Customer U-Gv	Draft	₹5900.00	₹0.00	₹5900.00	\$ <a href="#">Print / Download PDF</a> <small>(Click to print or save as PDF)</small>

Screenshot: Sales Invoices List

The screenshot shows the KINTO Smart Ops Production Management interface. On the left sidebar, there are three main categories: OPERATIONS, FINANCE & SALES, and PRODUCTION OPERATIONS. Under FINANCE & SALES, the 'Sales Invoices' option is selected and highlighted with an orange background. The main content area is titled 'Production Management' and 'Manage raw material issuance and gatepasses'. Below this, the 'Sales Invoices' section is displayed with a table. The table has columns: Invoice #, Date, Buyer Name, Status, Total, Paid, Outstanding, and Actions. There are four invoices listed:

Invoice #	Date	Buyer Name	Status	Total	Paid	Outstanding	Actions
INV-SAMPLE-001	01 Jan 1970	ABC Distributors Pvt Ltd	Dispatched	₹10500.00	₹0.00	₹10500.00	<a href="#">Print / Download PDF</a>
INV-1763008388849	01 Jan 1970	AutoTest Vendor	Ready for GP	₹29500.00	₹29500.00	₹0.00	<a href="#">Print / Download PDF</a>
INV-1762693203842	01 Jan 1970	XYZ Industries Test Automation	Delivered	₹5900000.00	₹0.00	₹5900000.00	<a href="#">Print / Download PDF</a>
INV-1762706022935	01 Jan 1970	Test Customer U-Gv	Draft	₹5900.00	₹0.00	₹5900.00	<a href="#">Print / Download PDF</a>

Each invoice row includes a link to 'Print / Download PDF' and a note '(Click to print or save as PDF)'.

Screenshot: Invoice Detail View

**SUCCESS:** All invoices are GST-compliant with proper CGST/SGST/IGST calculations based on customer location.

## 4.3 Dispatch Tracking

Track dispatches through a 5-stage workflow: Invoice Created ! Gatepass Generated ! Vehicle Out ! In Transit ! Delivered. Monitor real-time dispatch status for all shipments.

### Managing Dispatch Workflow

1. Access "Dispatch Tracking" from the sidebar
2. View all active dispatches with current status
3. Click on a dispatch to view complete details
4. Stage 1: Invoice ready for dispatch - Generate gatepass
5. Stage 2: Gatepass generated - Record vehicle details and mark vehicle out
6. Stage 3: Vehicle departed - Update status to in transit
7. Stage 4: In transit - Track location and estimated delivery
8. Stage 5: Upload proof of delivery documents
9. Mark dispatch as delivered upon confirmation
10. System automatically updates inventory and invoice status

- ₹ Pending Payments
- ✉ Credit Notes
- 📦 Sales Returns
  
- PRODUCTION OPERATIONS** +
- 📦 Raw Material Issuance
- 📝 Production Entries
- 📋 Production Reconciliation
- 📄 Gatepasses
  
- Dispatch Tracking**
- 🔔 Machine Startup Reminders
- ↗ WhatsApp Analytics
- 🖨️ Production Reconciliation Reps
- ↗ Variance Analytics

## Dispatch Tracking Dashboard

Monitor the complete dispatch workflow from invoice to delivery



Invoices (4) Gate Passes (3) Proof of Delivery

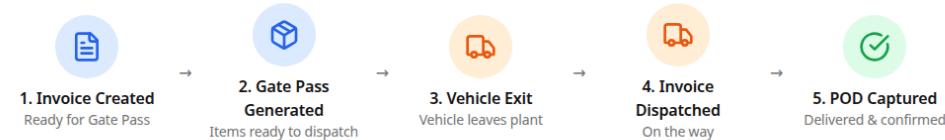
### Invoice Dispatch Status

Track invoices through the dispatch lifecycle

Invoice No.	Buyer	Amount	Invoice Date	Status	Progress	Actions
INV-SAMPLE-001	ABC Distributors Pvt Ltd	₹10,500.00	01 Jan 1970	<span>Dispatched</span>	<div style="width: 75%;">75%</div>	<span>🖨️ Print / Download PDF</span>
INV-1763008388849	AutoTest Vendor	₹29,500.00	01 Jan 1970	<span>Ready for Gate Pass</span>	<div style="width: 50%;">50%</div>	<span>🖨️ Print / Download PDF</span>
INV-1762693203842	XYZ Industries Test Automation	₹59,00,000.00	01 Jan 1970	<span>Delivered</span>	<div style="width: 100%;">100%</div>	<span>🖨️ Print / Download PDF</span>
INV-1762706022935	Test Customer U-Gv	₹5,900.00	01 Jan 1970	<span>Draft</span>	<div style="width: 25%;">25%</div>	<span>🖨️ Print / Download PDF</span>

### Dispatch Workflow

Complete 5-stage dispatch lifecycle



Screenshot: Dispatch Tracking - 5 Stages

**INFO:** The dispatch workflow prevents premature inventory deduction and ensures proper documentation at each stage.

## 4.4 Pending Payments Tracking

Track outstanding invoices, monitor payment history, and identify overdue accounts. FIFO (First In First Out) payment allocation ensures accurate tracking.

### Managing Payments

1. Navigate to "Pending Payments"
2. View invoice-wise outstanding balances for all customers
3. Identify overdue payments (highlighted in red)
4. Click on a customer to view detailed payment history
5. Record payment received from customer
6. Enter payment amount, date, and mode (Cash, Cheque, NEFT, etc.)

7. System automatically applies FIFO allocation to oldest invoices first
8. View updated outstanding balance after payment
9. Generate payment receipt for customer
10. Export pending payments report for follow-up

**Pending Payments**

Track outstanding invoice payments and payment history

**₹ Pending Payments**  
3 invoices with outstanding payments

Invoice Number	Date	Customer	Total Amount	Paid	Outstanding	Status	Actions
INV-SAMPLE-001	01-Jan-1970	ABC Distributors Pvt Ltd	₹10500.00	₹0.00	₹10500.00	Unpaid	⌚
INV-1762693203842	01-Jan-1970	XYZ Industries Test Automation	₹5900000.00	₹0.00	₹5900000.00	Unpaid	⌚
INV-1762706022935	01-Jan-1970	Test Customer U-Gv	₹5900.00	₹0.00	₹5900.00	Unpaid	⌚

Screenshot: Pending Payments Dashboard

**SUCCESS:** FIFO allocation ensures payments are applied to oldest invoices first, maintaining accurate aging reports.

## 4.5 Sales Returns Management

Manage product returns from customers through a 3-stage workflow: Quality Check !’ Inventory Update !’ Credit Note Generation.

### Processing Sales Returns

1. Click "Sales Returns" in the sidebar
2. Create new sales return entry
3. Select the original invoice
4. Enter returned items and quantities
5. Perform quality segregation: classify items as OK or Damaged
6. OK items: Return to finished goods inventory
7. Damaged items: Record as damaged stock (separate inventory category)
8. Add return reason and notes
9. Upload photos of returned goods if applicable
10. Submit the return entry
11. System automatically generates credit note
12. System updates inventory for OK items
13. Damaged items tracked separately for disposal/rework

**Sales Returns & Damage Handling**  
Manage post-delivery returns and damaged goods

+ Create Return

Total Returns	Pending Inspection	Inspected
1	0	0

**Returns List**

Return Number	Invoice	Return Date	Reason	Status	Actions
RET-TC26-001	INV-1763008388849	13 Nov 2025	quality issue	Completed	

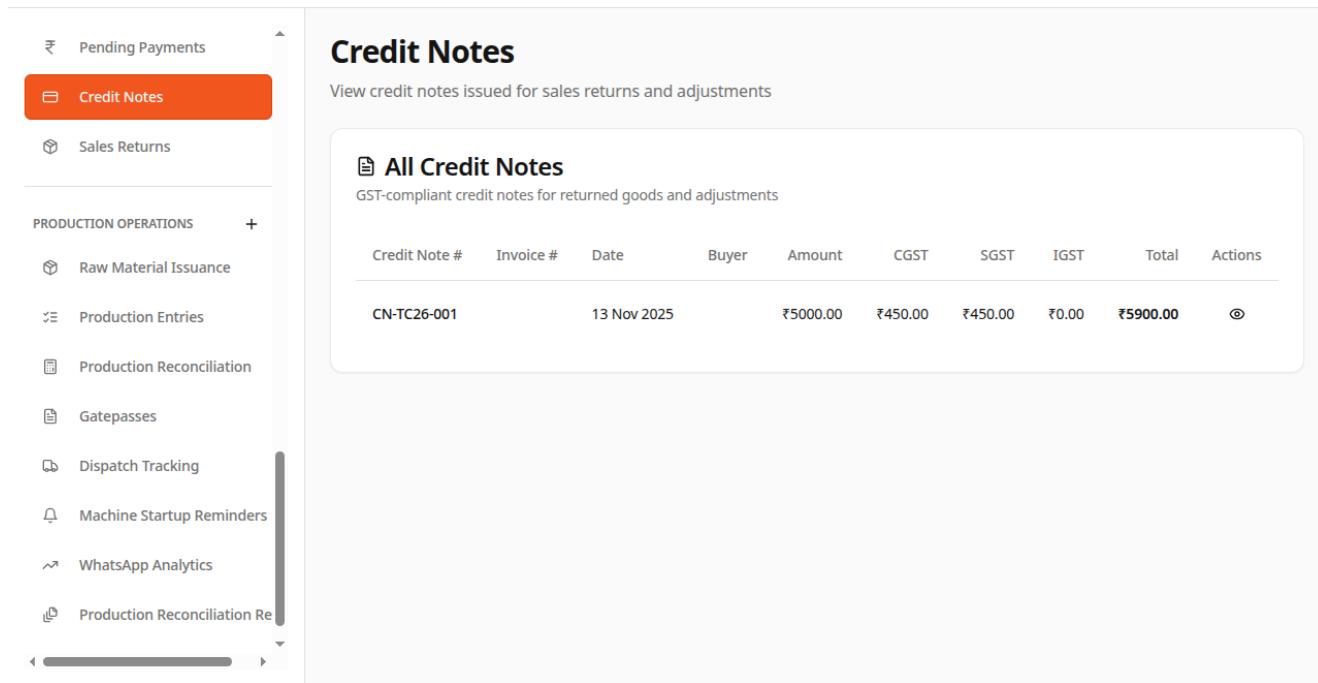
Screenshot: Sales Returns Management

## 4.6 Credit Notes

View and manage GST-compliant credit notes automatically generated from sales returns. Track adjustments to customer accounts.

### Viewing Credit Notes

1. Access "Credit Notes" from the sidebar
2. View list of all credit notes
3. Filter by customer, date range, or status
4. Click on a credit note to view complete details
5. Review line items with quantities and amounts
6. Check GST calculations (reversed from original invoice)
7. View linked original invoice and sales return
8. Print credit note for customer records
9. Credit note automatically adjusts customer outstanding balance
10. Export credit notes for accounting reconciliation



Credit Note #	Invoice #	Date	Buyer	Amount	CGST	SGST	IGST	Total	Actions
CN-TC26-001		13 Nov 2025		₹5000.00	₹450.00	₹450.00	₹0.00	₹5900.00	

Screenshot: Credit Notes List

## 4.7 Gatepass Management

Create and manage gatepasses for material and product movement. Gatepasses are automatically linked to invoices for seamless dispatch tracking.

### Managing Gatepasses

1. Access "Gatepass Management" via Dispatch Tracking
2. Gatepass automatically created from invoice
3. Enter vehicle number and driver details
4. Record transporter name and contact
5. Add any special instructions or handling notes
6. Print gatepass for security and driver
7. Mark vehicle out when dispatch leaves premises
8. Gatepass status automatically updates in dispatch tracking
9. View gatepass history for audit purposes

Pending Payments

Credit Notes

Sales Returns

**PRODUCTION OPERATIONS**

- Raw Material Issuance
- Production Entries
- Production Reconciliation
- Gatepasses** (Selected)
- Dispatch Tracking
- Machine Startup Reminders
- WhatsApp Analytics
- Production Reconciliation Report
- Variance Analytics

## Production Management

Manage raw material issuance and gatepasses

### Gatepasses

GP Number	Date	Status	Items	Customer/Vendor	Vehicle	Driver	Issued By	Actions
GP-1762694785136	Nov 09, 2025	Delivered	Test Hydraulic Cylinder HC-500 (10)	-	KA-01-E2E-FINAL	Final Test Driver 9998776655	manager_test	<span>(Click to print or save as PDF)</span> <span>Print</span> <span>Print / Download PDF</span> <span>Print Both</span> <span>Print</span> <span>Print Both</span> <span>Print</span> <span>Print Both</span>
GP-1762751816645	Nov 10, 2025	Vehicle Out	No items	-	TEST-VEH-001	Auto Test Driver	N/A	<span>(Click to print or save as PDF)</span> <span>Print</span> <span>Print / Download PDF</span> <span>Print Both</span> <span>Print</span> <span>Print Both</span> <span>Print</span> <span>Print Both</span>
GP-1763008568165	Nov 13, 2025	Vehicle Out	Test Product CN (50)	AutoTest Vendor 9998887776	MH-12-AB-1234	Rajesh Kumar +91-9876543210	testadmin	<span>(Click to print or save as PDF)</span> <span>Print</span> <span>Print / Download PDF</span> <span>Print Both</span> <span>Print</span> <span>Print Both</span> <span>Print</span> <span>Print Both</span>

Screenshot: Gatepass Records

# 5. Administration Workflows

## 5.1 User Management

Manage system users, assign roles, control access permissions, and maintain user accounts. Only administrators have access to user management.

### **Managing Users (Admin Only)**

1. Access "User Management" from the sidebar (Admin only)
2. View list of all system users
3. Click "Add User" to create a new user account
4. Enter username (must be unique)
5. Enter email address
6. Set initial password (user can change later)
7. Assign appropriate role (Operator, Reviewer, Manager, Admin)
8. Set user status (Active/Inactive)
9. Save user account
10. Communicate credentials securely to the user
11. To edit user: Click on user, modify details, save changes
12. To deactivate user: Set status to Inactive (retains history)

 Overview Dashboard  
 Sales Dashboard  
 Reports

## CONFIGURATION

[+](#)

-  [Users](#)
-  [Role Permissions](#)
-  [Machines](#)
-  [Machine Types](#)
-  [Spare Parts](#)
-  [PM Templates](#)
-  [Invoice Templates](#)
-  [Unit of Measurement](#)
-  [Vendor Master](#)

## User Management

19 total users

[+ Create User](#)
 Search users...
Auto User operator
 Username: auto\_user  
 Email: 6BdM1e@example.com
[!\[\]\(a895f1cfc2a4586a576707ad87b41f18\_img.jpg\) Edit User](#)[!\[\]\(8378693aafe4d79403da2348bb0b4061\_img.jpg\) Delete](#)John Doe operator
 Username: user\_u896HL\_N  
 Email: user\_u896HL\_N@kintotest.com
[!\[\]\(4945c270a84299e830fccf8bc8af6c34\_img.jpg\) Edit User](#)[!\[\]\(87a5c5a1c76280c2f1cd158a8009530f\_img.jpg\) Delete](#)Admin User operator
 Username: user-p5upfCXv  
 Email: user-p5upfCXv@kintotest.com
[!\[\]\(8cc37e2144b45404c8329d31e3ef4122\_img.jpg\) Edit User](#)[!\[\]\(30f00984aba99388d6a49f0cbef8fc1a\_img.jpg\) Delete](#)TestUser Admin operator
 Username: user\_hWsf4zh  
 Email: user\_hWsf4zh@kintotest.com
[!\[\]\(30e2d28fe2142091f54b6493a31d5e03\_img.jpg\) Edit User](#)[!\[\]\(a80ea4a906361f1750a6264cb535f6c0\_img.jpg\) Delete](#)Updated Test User Auto operator
 Username: testuser\_4H\_Vhi40  
 Email: testuser\_4H\_Vhi@kintotest.com
[!\[\]\(6a4340e6a6fb59c3be65706e52542130\_img.jpg\) Edit User](#)[!\[\]\(9e565ef0516b646b4aac64cf2dc5e24e\_img.jpg\) Delete](#)Delete Test operator
 Username:  
 Email: deletetestincGk7@test.com
[!\[\]\(343d79330d3bc70830dcd18dc807d8ca\_img.jpg\) Edit User](#)[!\[\]\(539da3a7ffda0df2a7761a24d1662def\_img.jpg\) Delete](#)Test Manager operator
 Username: testmanager  
 Email: manager@test.com
[!\[\]\(fbd8c079f1e3c6e43bdb0b5f53765296\_img.jpg\) Edit User](#)[!\[\]\(42c15924b5833e09826cd6d488514161\_img.jpg\) Delete](#)Test Manager manager
 Username: test\_manager\_F3-Noxdg  
 Email: No email
[!\[\]\(8df99873d53f20b0645e5eb5ac6160d3\_img.jpg\) Edit User](#)[!\[\]\(da9e86aa38fcad216622c27d2087ec82\_img.jpg\) Delete](#)Test Reviewer reviewer
 Username: test\_reviewer\_OjxjeYaa  
 Email: No email
[!\[\]\(1fe1d531ec0f3a711d9f8d7c9e7b76ed\_img.jpg\) Edit User](#)[!\[\]\(59619ed82708ea60347835bf9afc4a8d\_img.jpg\) Delete](#)Operator Test operator
 Username: operator\_test  
 Email: operator:test@kinto.com
[!\[\]\(df02e18d9451b660f7a91ddfec02395c\_img.jpg\) Edit User](#)[!\[\]\(f17289c1697d22738acad00bf98e0e94\_img.jpg\) Delete](#)Admin Test operator
 Username: admin\_cn  
 Email: admin\_cn@test.com
[!\[\]\(c463feb67f28a18790521d33238566d1\_img.jpg\) Edit User](#)[!\[\]\(bbf5dd097aab4b29ac4f2b98361dd5d6\_img.jpg\) Delete](#)Admin Test admin
 Username: admin\_test  
 Email: admin\_test@kintotest.com
[!\[\]\(6e57246bbfcdfca5bebde9e410c10fb6\_img.jpg\) Edit User](#)[!\[\]\(c28d8dc76f25c7b067dd92487ed935b5\_img.jpg\) Delete](#)E2E User operator

Screenshot: User Management

**WARNING:** Only administrators can create and manage user accounts. Protect admin credentials carefully.

## 5.2 Role Management & Permissions

Configure role-based permissions across all 36 system screens. Provide granular control over who can view, create, edit, or delete data in each module.

### Configuring Role Permissions (Admin Only)

1. Navigate to "Role Management"
2. Select the role to configure (Operator, Reviewer, Manager, Admin)
3. Review the 36 system screens in the permissions matrix
4. For each screen, grant or revoke permissions:
  5. - View: Can see the screen and its data
  6. - Create: Can add new records
  7. - Edit: Can modify existing records
  8. - Delete: Can remove records
9. Common permission patterns:
  10. - Operators: View + Create for production/checklists
  11. - Reviewers: View + Edit for review approval
  12. - Managers: All permissions for operational modules
  13. - Admins: Full permissions across all modules
14. Save role configuration
15. Permissions apply immediately to all users with that role

The screenshot shows the KINTO SmartOps Role Management interface. On the left, there's a sidebar with navigation links like Overview Dashboard, Sales Dashboard, Reports, Configuration (with a plus sign), Users, and Role Permissions (which is highlighted in orange). The main area is titled "Role Management" and sub-titled "Manage roles and their permissions". It lists five roles in cards: "operator" (Default), "reviewer" (Default), "manager" (Default), "admin" (Default), and "test\_manager". Each card contains a brief description, "Permissions" and "Edit" buttons, and a "Delete" button for the "test\_manager" card. A red "Create Role" button is located in the top right corner of the main area.

Screenshot: Role Management & Permissions

**INFO:** Plan permissions carefully. Too many permissions create security risks; too few limit productivity.

## 5.3 Notification Settings

Configure automated email and WhatsApp notifications for critical events, reminders, and alerts. Ensure timely communication for time-sensitive activities.

## **Configuring Notifications**

- 1.** Click "Notification Settings" in the sidebar
- 2.** Enable or disable notification types:
  - 3.** - Machine Startup Reminders
  - 4.** - Missed Checklist Notifications
  - 5.** - Overdue PM Alerts
  - 6.** - Payment Reminders
  - 7.** - Low Stock Alerts
- 8.** Configure email recipients for each notification type
- 9.** Set up WhatsApp integration (requires Meta Business API)
- 10.** Define notification schedules (daily, weekly, immediate)
- 11.** Customize notification message templates
- 12.** Test notification delivery to verify configuration
- 13.** Save notification settings
- 14.** System automatically sends notifications based on configuration

- i Spare Parts
- i PM Templates
- i Invoice Templates
- i Unit of Measurement
- i Vendor Master
- i Raw Material Types
- i **Notification Settings**

## Notification Settings

Configure email and WhatsApp notifications for machine startup reminders

i **On-Premise Deployment Setup**

For production use, you can configure notification settings here OR set environment variables on your server:

- SENDGRID\_API\_KEY - SendGrid API key for email
- WHATSAPP\_PHONE\_NUMBER\_ID - Meta WhatsApp Phone Number ID
- WHATSAPP\_ACCESS\_TOKEN - Meta WhatsApp Access Token
- WHATSAPP\_VERIFY\_TOKEN - Webhook verification token (required)

Database settings take precedence over environment variables.

i **Email Notifications (SendGrid)**

Configure email notifications via SendGrid (toggle)

**Sender Email Address**  
  
This email must be verified in your SendGrid account

**Sender Name**

i **WhatsApp Notifications (Meta Business Cloud API)**

Configure WhatsApp via Meta Business Cloud API (2.4x cheaper, FREE service conversations) (orange toggle)

**Meta Phone Number ID**  
  
Get this from Meta Business Manager under WhatsApp > API Setup

**Meta Access Token**  
  
Generate a permanent access token from your Meta Business App

**Webhook Verify Token**  
  
Create a secure random token for webhook verification (REQUIRED for security)

i **Setup Guide:** Create a Meta Business App, add WhatsApp product, configure webhook with verify token. Webhook URL: /api/whatsapp/webhook

**Test Mode** (orange toggle)

When enabled, notifications will only be logged to console (no real emails/WhatsApp sent)

Save Settings

**Current Status**

- i Email notifications: Disabled
- ✓ WhatsApp notifications: Enabled
- i Mode: Test (Console logging)

Screenshot: Notification Configuration

**INFO:** WhatsApp integration requires Meta Business API configuration and verification. Contact support for setup.

## 5.4 Vendor Management

Maintain comprehensive vendor master data for purchase orders, procurement tracking, and supplier

performance management.

## Managing Vendors

1. Access "Vendor Management" from the sidebar
2. Click "Add Vendor" to create new vendor
3. Enter vendor code (unique identifier)
4. Enter vendor name and contact person
5. Add complete address details
6. Enter contact numbers and email
7. Add GST number for tax compliance
8. Specify payment terms (Net 30, Net 60, etc.)
9. Set vendor category (Raw Material, Spare Parts, Services)
10. Add bank details for electronic payments
11. Save vendor master data
12. To edit: Click on vendor, modify, save changes

Code	Name	Mobile	GST/Aadhaar	City	Type	Cluster	Status	Actions	
VEND-4854	AutoTest Vendor	9998887776	-	-	Customer	No	Active		
VEND-0JNS	Test Vendor Afq-yY	9876543210	29TEST1234F1Z5	-	Customer	No	Active		
VEN-3QnN	Test Vendor 8vM	9876543210	29TESTVENDOR123Z	Bangalore	Customer	No	Active		
CUST-001	ABC Distributors Pvt Ltd - Updated	+91-9876543211	27ABCDE1234F2Z6	Mumbai	Customer	No	Active		

Screenshot: Vendor Management

## 5.5 Reports & Analytics

Generate comprehensive reports for operations, finance, quality, and compliance. Export reports to Excel or PDF for analysis and distribution.

### Generating Reports

1. Access "Reports" from the sidebar
2. Select report category:
  3. - Production Reports (Production Reconciliation, Variance Analysis)
  4. - Quality Reports (QA Checklist Summary, PM Execution)
  5. - Sales Reports (Invoice Summary, Pending Payments)
  6. - Inventory Reports (Stock Status, Movement Analysis)
  7. - Financial Reports (GST Reports, Revenue Analysis)
8. Set date range and filters
9. Preview report on screen

- 10. Export to Excel for data analysis**
- 11. Export to PDF for printing or sharing**
- 12. Print report directly**
- 13. Email report to stakeholders**

**Reports**  
Access all your print reports and analytics

**Filters**  
Filter reports by date range and customer

**From Date** mm/dd/yyyy **To Date** mm/dd/yyyy **Customer** All Customers **Clear Filters**

**Gatepasses** **Invoices** **Issuances** **Purchase Orders** **Maintenance** **GST Reports**

**Gatepass Reports**  
3 gatepasses found

GP Number	Date	Customer/Vendor	Vehicle	Actions
GP-1762694785136	Nov 09, 2025	-	KA-01-E2E-FINAL	Print
GP-1762751816645	Nov 10, 2025	-	TEST-VEH-001	Print
GP-1763008568165	Nov 13, 2025	AutoTest Vendor	MH-12-AB-1234	Print

Screenshot: Reports Center

# 6. Master Data Management

## 6.1 Product Categories

Define and manage product categories for classification, filtering, and reporting purposes.

### **Managing Product Categories**

1. Navigate to "Product Categories" in the sidebar
2. Click "Add Category" to create new
3. Enter category code (unique identifier)
4. Enter category name and description
5. Set display order for sorting
6. Mark as active or inactive
7. Save the category
8. To edit: Click category, modify, save
9. Categories are used in Product Master for classification

**Product Categories**

Manage product categories and their organization

**All Categories**

- Test Category AG3C6E (AG3C6E)**  
Order: 100 Active
- Finished Goods (FG)**  
Completed products ready for sale  
Order: N/A Active
- Hydraulic Components (HC)**  
Hydraulic system components  
Order: N/A Active
- Test Category (TC)**  
Category for testing purposes  
Order: N/A Active
- Raw Materials (RM)**  
Raw materials for production  
Order: N/A Active
- Semi-Finished Goods (SFG)**  
Products in intermediate stages  
Order: N/A Active
- Test Category (CAT-TEST)**  
Order: N/A Active

Screenshot: Product Categories Master

## 6.2 Product Types

Configure product types for detailed product classification within categories.

### Managing Product Types

1. Access "Product Types" from the sidebar
2. Click "Add Type" to create new
3. Enter type code (unique)
4. Enter type name and description
5. Link to parent product category
6. Set display order
7. Mark active status
8. Save product type
9. Types provide sub-classification within categories

The screenshot shows the 'Product Types' master page. The left sidebar has sections for PRODUCTION and OPERATIONS. Under PRODUCTION, there are links for Vendor Master, Raw Material Types, and Notification Settings. Under OPERATIONS, there are links for Product Master, Product Categories, Product Types (which is highlighted with an orange background), Checklist Builder, Raw Materials, and Finished Goods. The main content area is titled 'Product Types' and 'Manage product types and classifications'. Below it is a section titled 'All Types' with a 'Loading...' message. In the top right corner of the main area, there is a red button with a plus sign and the text 'Add Type'.

Screenshot: Product Types Master

## 6.3 Spare Parts Management

Track spare parts inventory for machine maintenance and preventive maintenance execution. Manage reorder levels and consumption tracking.

### Managing Spare Parts

1. Access "Spare Parts" from the sidebar
2. Add new spare part with unique code
3. Enter part description and specifications
4. Define unit of measure
5. Set reorder level (minimum stock)
6. Set reorder quantity (order size)
7. Link to applicable machines
8. Set storage location
9. Record current stock level
10. Track usage in PM activities automatically
11. View consumption history
12. Generate reorder reports when stock below minimum

reports
[+ Add Spare Part](#)

CONFIGURATION +

- [Users](#)
- [Role Permissions](#)
- [Machines](#)
- [Machine Types](#)
- [Spare Parts](#)
- [PM Templates](#)
- [Invoice Templates](#)
- [Unit of Measurement](#)
- [Vendor Master](#)
- [Raw Material Types](#)
- [Notification Settings](#)

### Spare Parts Management

Search spare parts...

**Delete Test Part q|G73O**  
Part #: DTP-5jqW  
Price: ₹100 Stock: 5 Reorder at: 10

Edit
Machines
Delete

**Delete Test Part qFTWsk**  
Part #: DTP-djal  
Price: ₹100 Stock: 5 Reorder at: 10

**Delete Test doK7kE**  
Part #: DTP-ijVj  
Price: ₹100 Stock: 5 Reorder at: 10

Edit
Machines
Delete

**Delete Test XF7D5m**  
Part #: DTP-pEVs  
Price: ₹100 Stock: 5 Reorder at: 10

**Test Part zAzO6z**  
Part #: TP-gGFc  
Category: testing  
Price: ₹150 Stock: 25 Reorder at: 10

Edit
Machines
Delete

**Test Part AiHso4**  
Price: ₹200 Stock: 30 Reorder at: 8

**Motor**  
Price: ₹1000 Stock: 35 Reorder at: 2

Edit
Machines
Delete

**Motor V2**  
Price: ₹500 Stock: 3 Reorder at: 5

**Test Spare Part SPd0**  
Price: ₹250 Stock: 30 Reorder at: 8

Edit
Machines
Delete

**Test Spare Part pmF5cn - Edited**  
Price: ₹50 Stock: 0

**Screenshot: Spare Parts Inventory**

# 7. Support & Troubleshooting

## 7.1 Common Issues & Solutions

### **Issue: Cannot Login**

Solution: Verify your username/email and password are correct. Ensure caps lock is off. If you have forgotten your password, contact your system administrator to reset it. Check that your account is active (not disabled).

### **Issue: Missing Menu Items**

Solution: Menu items are controlled by your role permissions. Contact your administrator to verify your assigned role and permissions. Some features may be restricted to specific roles (Admin, Manager, etc.).

### **Issue: Data Not Saving**

Solution: Ensure all required fields are completed (marked with asterisks or red indicators). Check your internet connection. Try refreshing the page and re-entering data. If the issue persists, check browser console for errors and contact support.

### **Issue: Report Not Generating**

Solution: Verify the selected date range contains data. Try broadening the date range or adjusting filters. Ensure you have permissions to view the requested report. Check your internet connection. Try exporting in a different format (Excel vs PDF).

### **Issue: Checklist Won't Submit**

Solution: Review all checklist items - incomplete required items prevent submission. Check for validation errors highlighted in red. Ensure all required photos are uploaded. If you added comments, ensure they meet minimum length requirements.

## 7.2 Best Practices

1. Complete QA checklists immediately after each shift while details are fresh
2. Perform production reconciliation daily to maintain accurate inventory
3. Review pending payments weekly to identify and follow up on overdue accounts
4. Execute preventive maintenance on schedule to avoid equipment failures
5. Generate variance analytics reports monthly to track performance trends
6. Keep master data (products, materials, vendors, categories) current
7. Back up critical reports and documentation regularly
8. Log out of the system when finished to maintain security
9. Report bugs or issues promptly to your administrator
10. Attend training sessions to stay updated on new features

## 7.3 System Requirements

KINTO Smart Ops is a web-based application accessible via modern web browsers. Recommended specifications:

1. Web Browser: Chrome 90+ (recommended), Firefox 88+, Safari 14+, or Edge 90+
2. Internet Connection: Stable broadband connection (minimum 2 Mbps)
3. Screen Resolution: 1280x800 or higher recommended
4. RAM: 4GB minimum, 8GB recommended
5. Operating System: Windows 10+, macOS 10.14+, or Linux (Ubuntu 18.04+)
6. PDF Reader: For viewing generated reports
7. Excel: For working with exported Excel reports (optional)

## 7.4 Getting Help

For technical support or assistance:

1. Check this user manual for step-by-step instructions
2. Contact your system administrator for account or permission issues
3. Report bugs or technical problems to your IT department
4. Request additional training if needed for specific workflows
5. Provide detailed error messages and screenshots when reporting issues

**TIP:** Keep this manual accessible for quick reference while using KINTO Smart Ops.