Toll Free: 1-844-688-5584
Email: support@projx360.com
Live Chat: https://projx360.com

Getting Started

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Starting Tips

- Email your company logo to support@projx360.com and that will be updated in your environment.
- We can only import clients, companies and products. Attachments are located in your welcome email.
- Client, Company, Proposals, Projects, Work Orders and any area that does not offer a delete option means you can't delete it. We recommend if you want to create test items do so in our free sandbox area. https://projx360.com/demo. Your only option if you have created extra data is to use it for the next record you are adding.
- Recommended Web Browser: Google Chrome. Make sure you are running the latest version.
- App: The ProjX360 Management Solution does not need a specific mobile app as it has been built in responsive design and will format appropriately for your devices browser. We do have an app available for your ProjX360 environment to add additional features to the time tracking and access to your environment without having to log in each time. Search your device store for "ProjX360" to find our free app. If you are having trouble connecting verify you are using the same url as you are on desktop with "https".
- If you need a new license contact support@projx360.com or use live chat on our website projx360.com.
- If you need to remove any of your PM (Project Management) licenses please mark inactive the user you would like to remove. If you are trying to remove a Sales CRM or PR (Proposal) license click on the user who has the CRM/PR license assigned to them and uncheck next to Proposal or CRM License. Please contact support@projx360.com so your billing can be adjusted.
- Billing related: Please call us toll free 1-844-688-5584 or live chat on projx360.com.
- Learning Center: https://projx360.com/help
- Request Online Training by Go To Meeting: https://projx360.com/training-request
- Request On-Site Training: https://projx360.com/support/on-site-training
- Upcoming ProjX360 enhancements: https://projx360.com/road-map
- Request New Feature: https://projx360.com/contact-us

Clients / CRM People

If you did not purchase a Sales CRM license you will not have CRM People or Companies, instead you will only see clients from the menu.

Syncing Clients with QuickBooks

- Do not add any new client records to ProjX360 or you will not be able to sync with QB. There will be a warning message prompting this. If this happens see (I added a ProjX360 client and want to sync with QB below).
- Make sure your QB is cleaned up since it will pull all of your existing QB clients, you can’t choose which ones to bring over.
- Any QB records you are not using mark them as “Inactive” so they will not pull over into ProjX360.
- Please make sure every contact has a First, Last Name, Phone Number, Email Address, Complete Address with Country if possible.
- After you have fully went through your QB and cleaned up your records it’s best to do a csv export of your clients list and double check the data to make sure important fields such as first, last name are not missing. After you are sure all records are cleaned up in QB you can sync your clients.
- If you choose not to clean up QB but wish to sync some of your QB clients you can provide us the “CRM People CSV”. Once we have that imported you will have to match the ProjX360 records that were sent to us on the CSV to your records in QB. Matching has to be done only one time.

I added a ProjX360 client and want to sync with QB

- Use “CRM People CSV”. Sent with your ProjX360 welcome email. You can run an export directly from QB. Data will have to be formatted. Once complete send to support@projx360.com.
- Use the provided format, no extra columns can be added for import.
- Auto match your clients by dragging and dropping which records are a match in ProjX360/QB.

Importing Clients CSV

- Use “CRM People CSV”. Sent with your ProjX360 welcome email. Once complete send to support@projx360.com.
- Use the provided format, no extra columns can be added for import.

Importing Companies CSV

- Use “CRM Company CSV”. Sent with your ProjX360 welcome email. Once complete send to support@projx360.com.
- Use the provided CSV format, no extra columns can be added for import.

Once your client data has populated into ProjX360 make all new changes in ProjX360 and sync your clients so the new data is pushed to QB.

Settings

Configuration

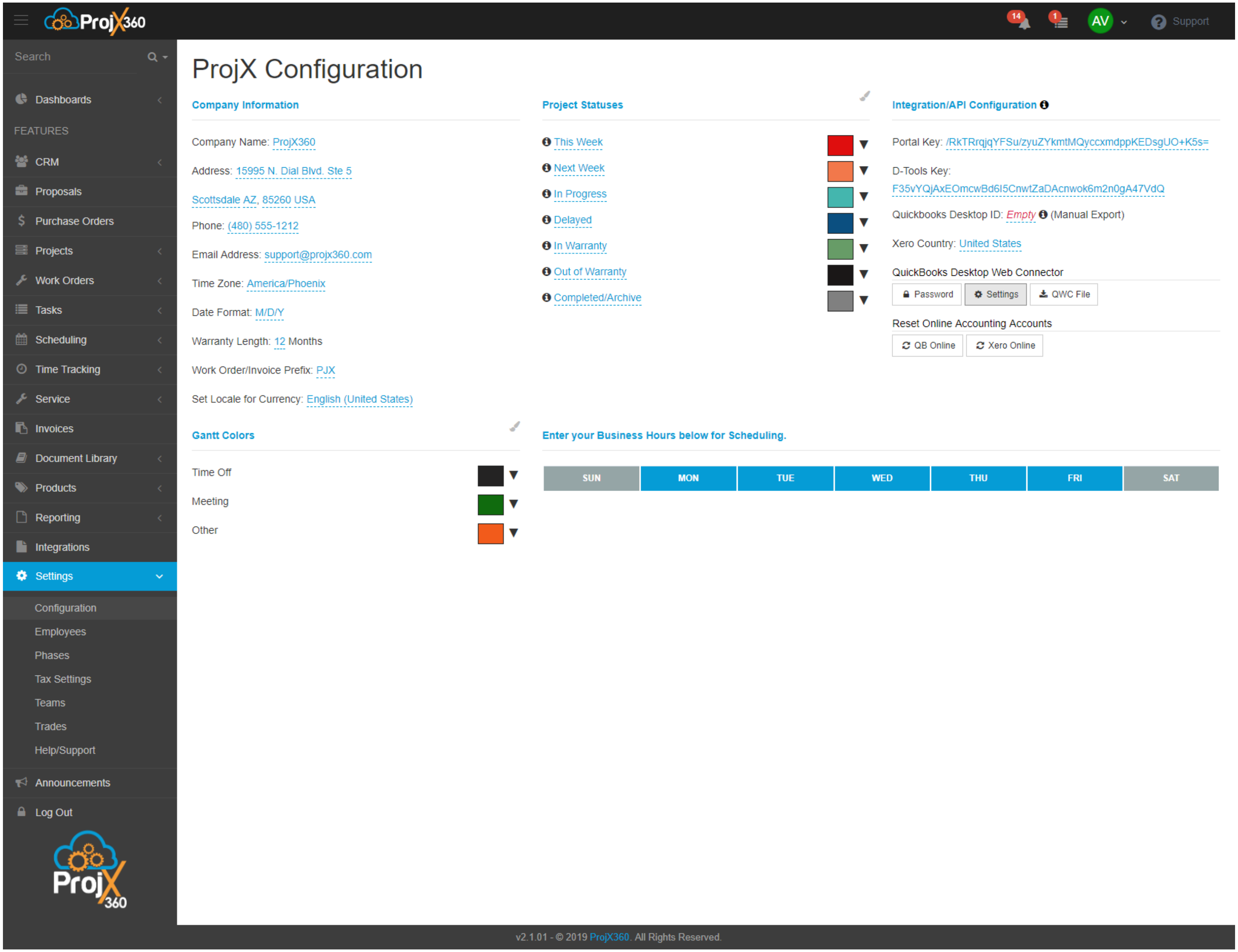
- **Company Information**: Make sure all of your company information is filled out. (Company Name, Address, Phone, Email Address, Time Zone, Date Format, Warranty Length, Work Order/Invoice Prefix, Set Locale for Currency).

- **Project Statuses**: Adjust project status if needed. Do not change In Warranty, Out of Warranty, Completed/Archive unless you have a similar name for them. Once a project status is changed to In Warranty/Out of Warranty, that triggers the project to move to our Service Project area.

- **Integration/API Configuration**: Portal, D-Tools, QuickBooks Desktop. Click the "i" icon to see the link to all of our ProjX360 guides.

- **Gantt Colors**: Scheduling, Project Gantt View colors

- **Enter your Business Hours below for Scheduling**: Click on each day to adjust your business hours. Please a check only on days you are open. Keep in mind any days you leave as closed will not show up on the scheduling calendar.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Integrations
Settings
Configuration
Employees
Phases
Tax Settings
Teams
Trades
Help/Support
Announcements
Log Out
ProjX 360
ProjX Configuration
Company Information
Company Name: ProjX360
Address: 15995 N. Dial Blvd. Ste 5
Scottsdale AZ, 85260 USA
Phone: (480) 555-1212
Email Address: support@projx360.com
Time Zone: America/Phoenix
Date Format: M/D/Y
Warranty Length: 12 Months
Work Order/Invoice Prefix: PJX
Set Locale for Currency: English (United States)
Project Statuses
This Week
Next Week
In Progress
Delayed
In Warranty
Out of Warranty
Completed/Archive
Integration/API Configuration
Portal Key: /RkTRrqjqYFSu/zyuZYkmtMQyccxmdppKEDsgUO+K5s=
D-Tools Key:
F35vYQjAxEOmcwBd6I5CnwtZaDAcnwok6m2n0gA47VdQ
Quickbooks Desktop ID: Empty (Manual Export)
Xero Country: United States
QuickBooks Desktop Web Connector
Password
Settings
QWC File
Reset Online Accounting Accounts
QB Online
Xero Online
Gantt Colors
Time Off
Meeting
Other
Enter your Business Hours below for Scheduling.
SUN
MON
TUE
WED
THU
FRI
SAT
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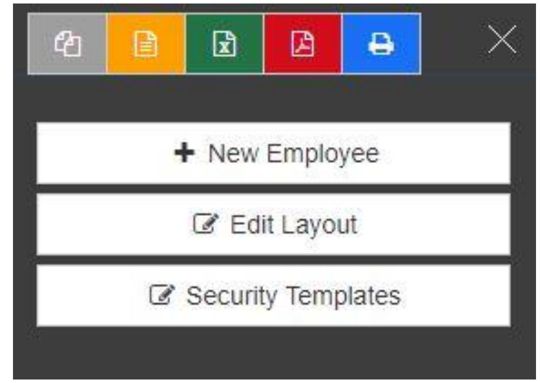
Employees



Overview of all your active and inactive employees.

Click the orange cogwheel for menu options. 

- **Icons**: This gives you the ability to Copy, CSV, Excel, PDF or Print the current data shown.
- **+ New Employee**: Create new employees. Upon saving their information the new user will receive a welcome email. Have them check spam/clutter if they do not receive it. If they still do not see a welcome email go to your environment login page and use “Forget Password?”.
- **Edit Layout**: This is where you can drag and drop the order in which your employee column information displays. Toggle the eye icon to show/hide columns if there are certain columns you do not want to display.
- **Security Templates**: This is where you can create security permissions for your employees. Example: An administrator may have access to everything in ProjX360 so go through and check everything under the General, Forms, Time Track tabs. Another template could be for a Technician and since you may not give them access to certain areas of the software you will want to go through and check off what they will have access to.

Tips

- Click on column headers to sort data.
- Utilize the “Search…” feature to narrow results.
- You can toggle between your Active/Inactive employees by clicking between the tabs.
- Show “15” entries will display. If you need to show more results change this and it will save your page setting.

ProjX360

Search

Dashboards

FEATURES

- CRM
- Proposals
- Purchase Orders
- Projects
- Work Orders
- Tasks
- Scheduling
- Time Tracking
- Service
- Invoices
- Document Library
- Products
- Reporting
- Integrations
- Settings
  - Configuration
  - Employees
  - Phases
  - Tax Settings
  - Teams
  - Trades
  - Help/Support
- Announcements
- Log Out

14 1 AV Support

Employees

Active Inactive

Search...

First Name	M Initial	Last Name	Employee Status	Phone	Email Address	Classification
Amy		Varela	Active	•••	amy@projx360.com	Administrator
Brian		Moffet	Active	•••	support@projx360.com	Administrator
Doug		Greenwald	Active	(480) 659-1297	doug@projx360.com	Administrator
Jason		Jones	Active	•••	jason@projx360.com	Installer
Steve		Clark	Active	(480) 659-1297	steve@projx360.com	Project Manager
Steve		Denne	Active	(480) 659-1297	info@projx360.com	Administrator

Showing 1 to 6 of 6 entries

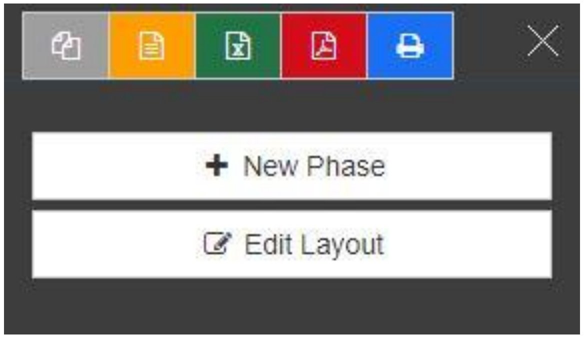
Show 15 entries

Previous 1 Next

ProjX 360

Phases

Setup your phases along with your cost/hr and price/hr.

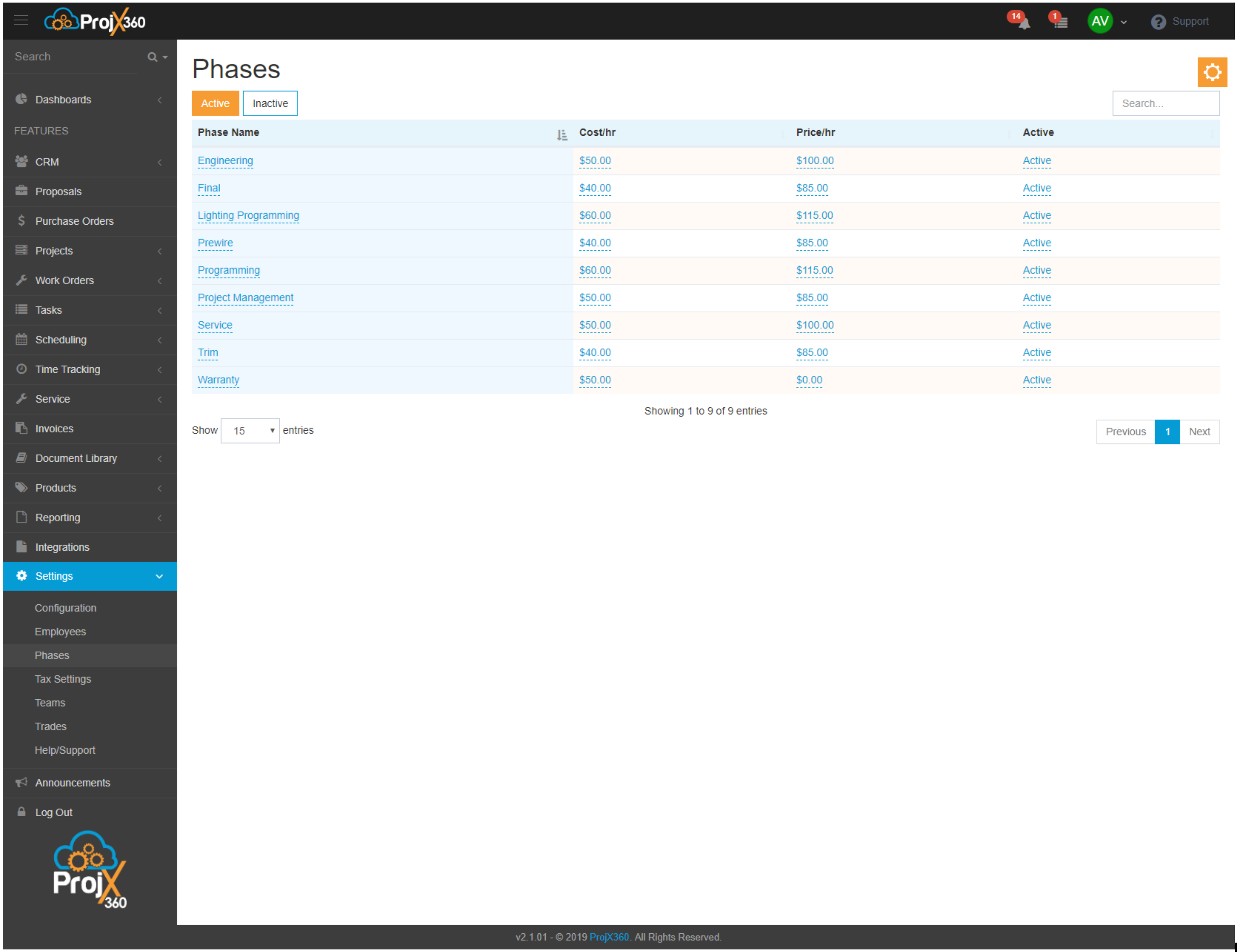


Click the orange cogwheel for menu options. 

- **Icons**: This gives you the ability to Copy, CSV, Excel, PDF or Print the current data shown.
- **+ New Phase**: Choose your phase name, cost per hour and price per hour. Save.
- **Edit Layout**: This is where you can drag and drop the order in which your employee column information displays. Toggle the eye icon to show/hide columns if there are certain columns you do not want to display.

Tips

- Click on column headers to sort data.
- Utilize the “Search…” feature to narrow results.
- You can toggle between your Active/Inactive phases by clicking between the tabs.
- Show “15” entries will display. If you need to show more results change this and it will save your page setting.


ProjX360
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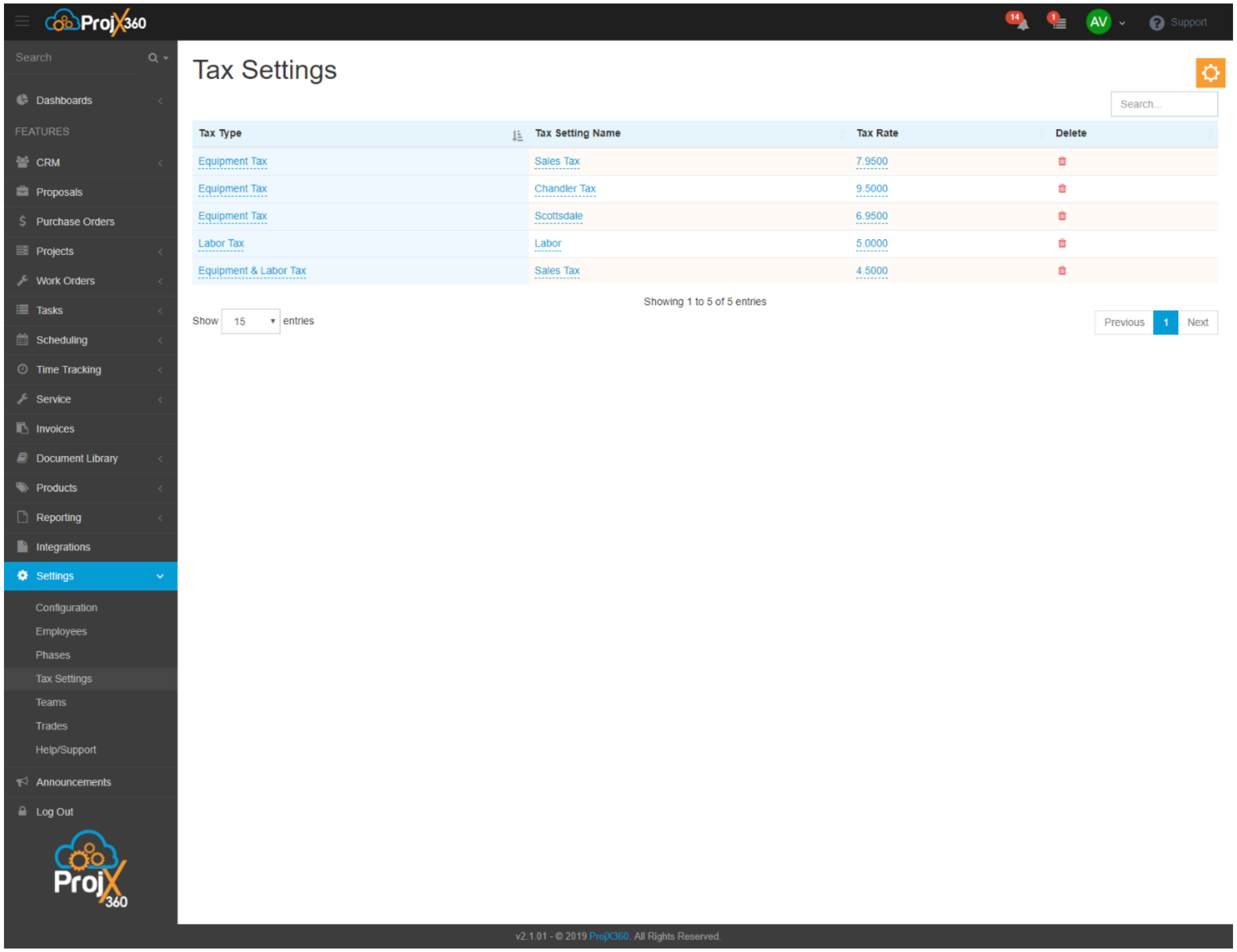
Reporting
Integrations
Settings
Configuration
Employees
Phases
Tax Settings
Teams
Trades
Help/Support
Announcements
Log Out
Phases
Active
Inactive
Search...
Phase Name | Cost/hr | Price/hr | Active
Engineering | $50.00 | $100.00 | Active
Final | $40.00 | $85.00 | Active
Lighting Programming | $60.00 | $115.00 | Active
Prewire | $40.00 | $85.00 | Active
Programming | $60.00 | $115.00 | Active
Project Management | $50.00 | $85.00 | Active
Service | $50.00 | $100.00 | Active
Trim | $40.00 | $85.00 | Active
Warranty | $50.00 | $0.00 | Active
Showing 1 to 9 of 9 entries
Show 15 entries
Previous 1 Next
v2.1.01 - © 2019 ProjX360. All Rights Reserved.

Tax Settings

Add tax and choose tax types (Equipment, Labor, or both).

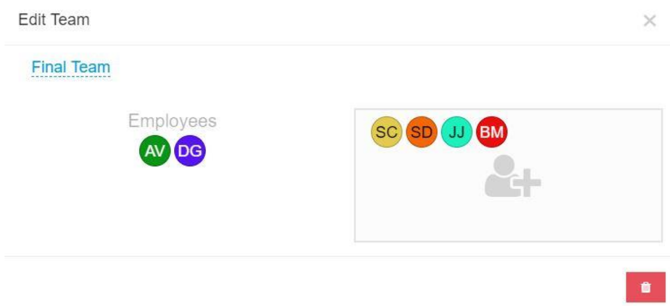
- **Add Tax**: Choose the Tax Setting Name, Tax Rate, Tax Type.
- **Edit Layout**: This is where you can drag and drop the order in which your employee column information displays. Toggle the eye icon to show/hide columns if there are certain columns you do not want to display.

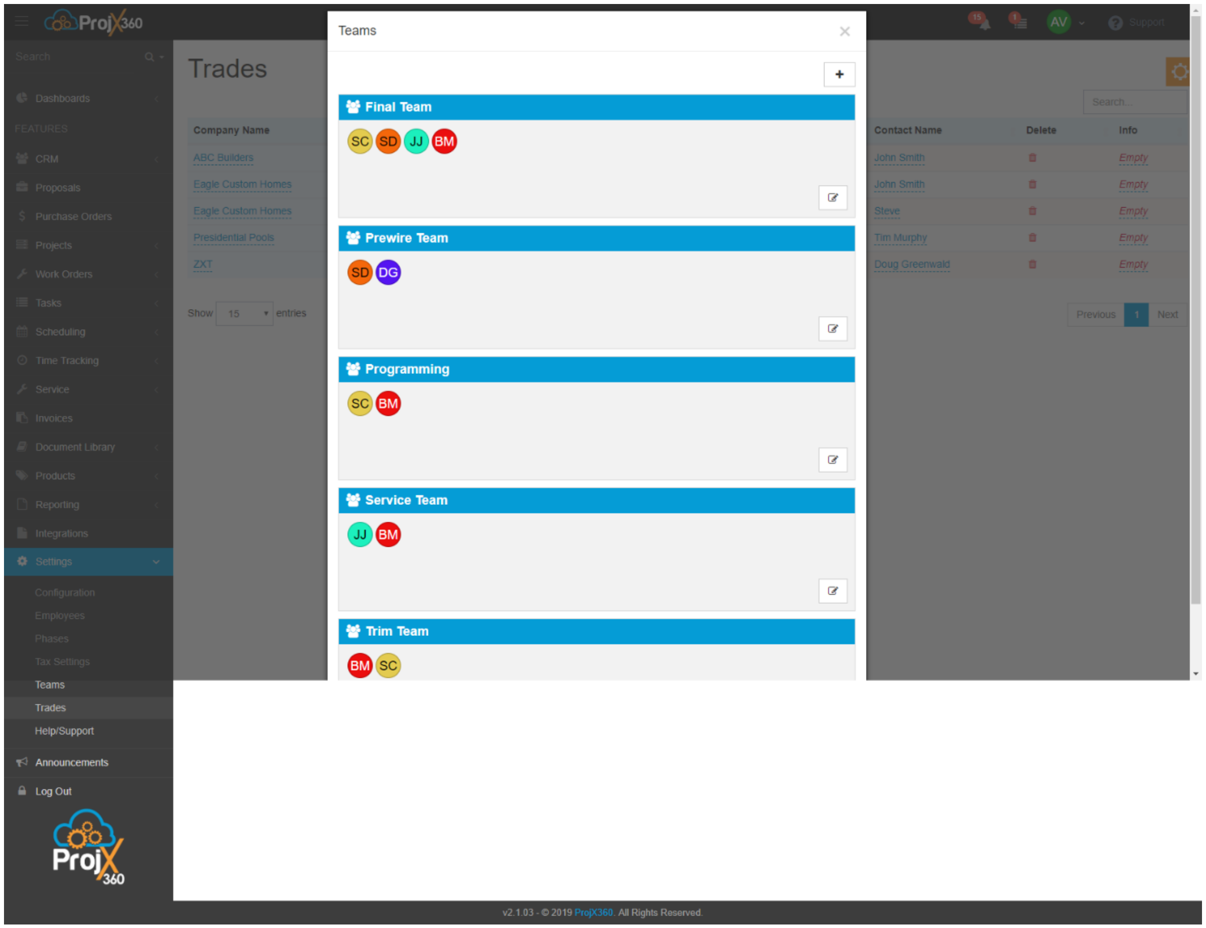


Teams

Add or Edit existing teams for scheduling.

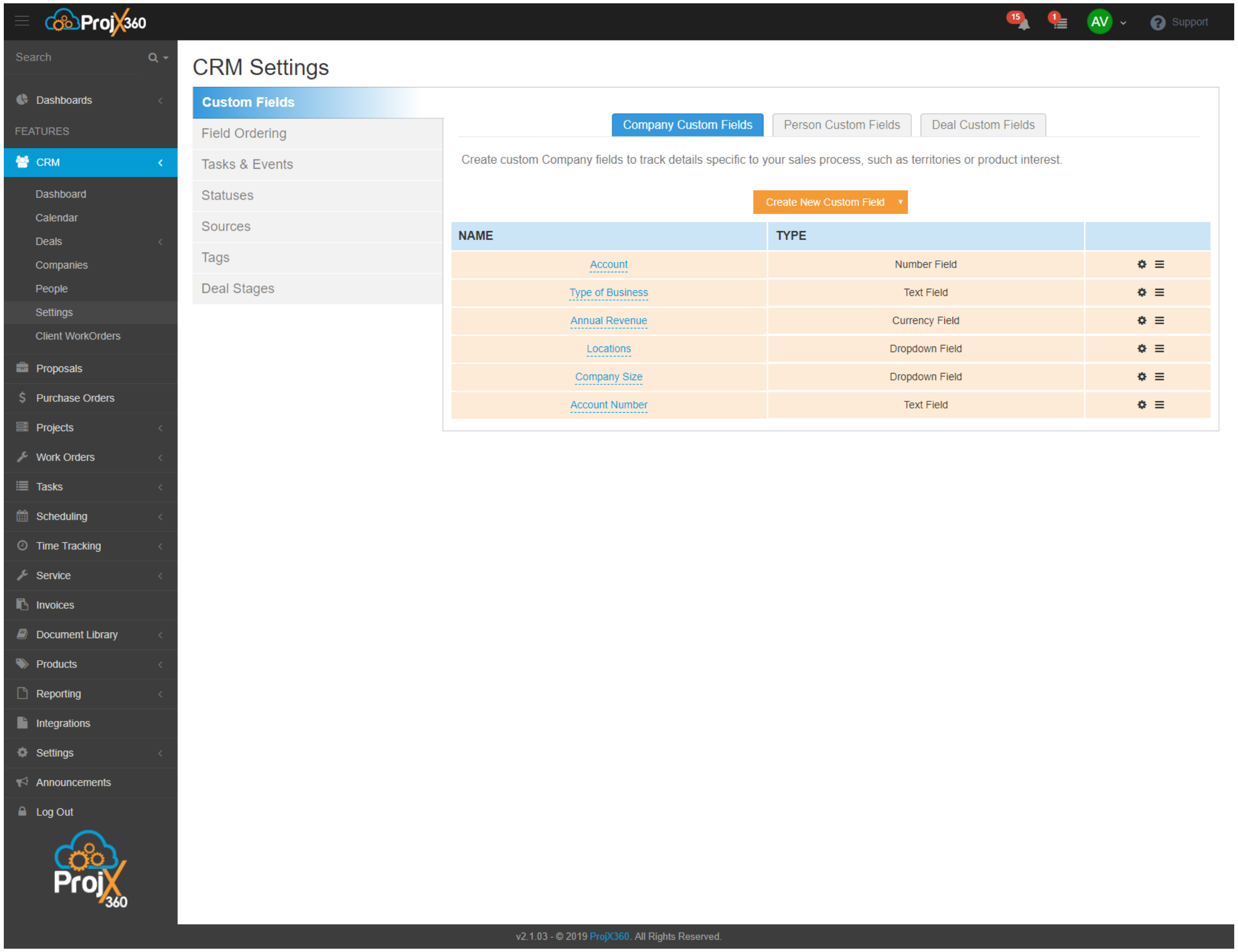
- **Add New Team**: Click the "+".
- **Edit Team**: This is where you can drag and drop which employees are going to be a part of that team.
- **Delete Team:** Click the trash can icon.





CRM Settings

Modify your CRM Setting to fit your company needs.



Custom Fields

Create custom Company, Person or Deal fields to track details specific to your sales process, such as territories or product interest.

Field Ordering

Here you can customize your Company, Person or Deal field preferences. You can decide which fields are displayed, and the other order in which they appear when adding or editing a Company, Person or Deal.

Company Field Ordering | Person Field Ordering | Deal Field Ordering

Here you can customize your Company field preferences. You can decide which fields are displayed, and the order in which they appear when adding or editing a Company.

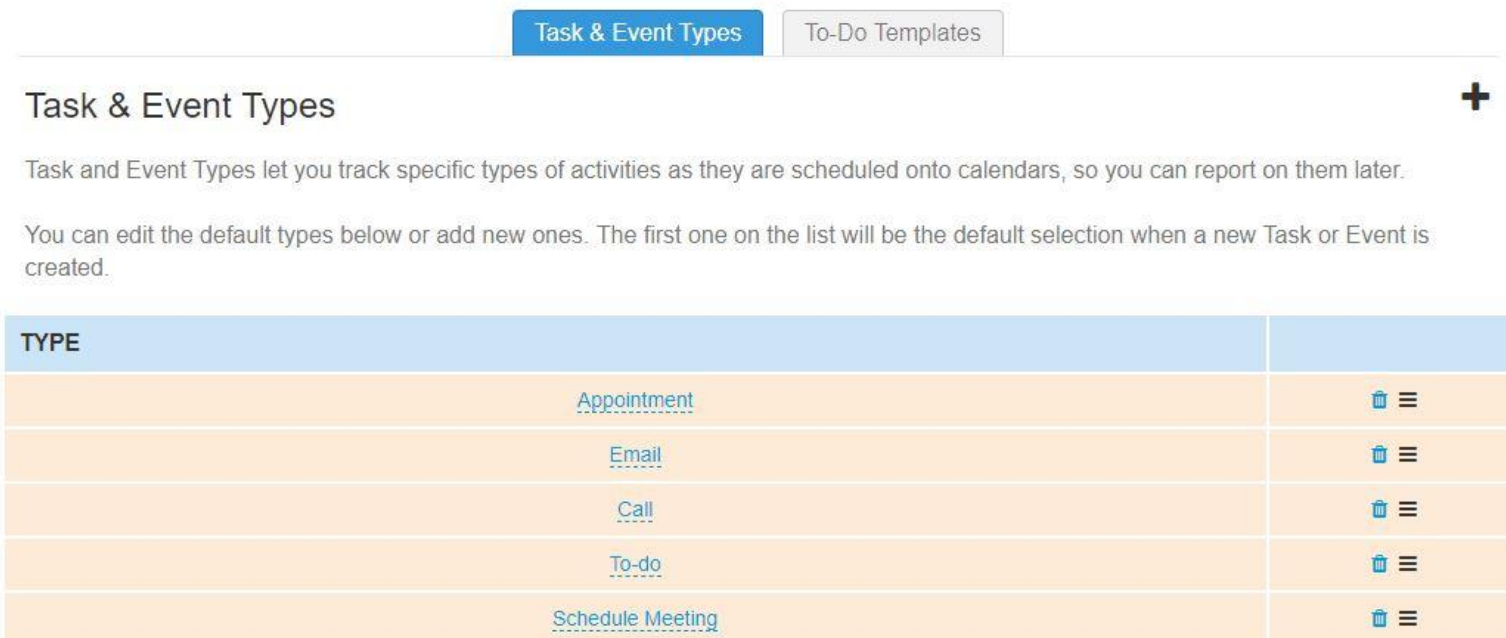
FIELDNAME	DESCRIPTION	
company	Company Name	
owner	Owner's Name	
cemail	Email	
mphone	Mobile Phone	
cphone	Company Phone	
ophone	Other Phone / Fax etc...	
caddress	Address	
caddress2	Address 2	
ccity	City	
cstate	State	
cpostcode	Postcode	
ccountry	Country	
summary	Short Summary or Note	
website	Website URL	

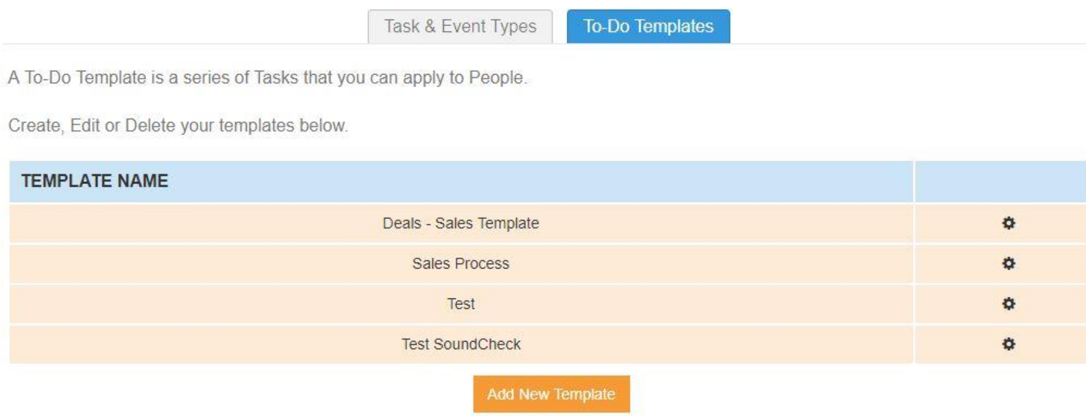
Tasks & Events

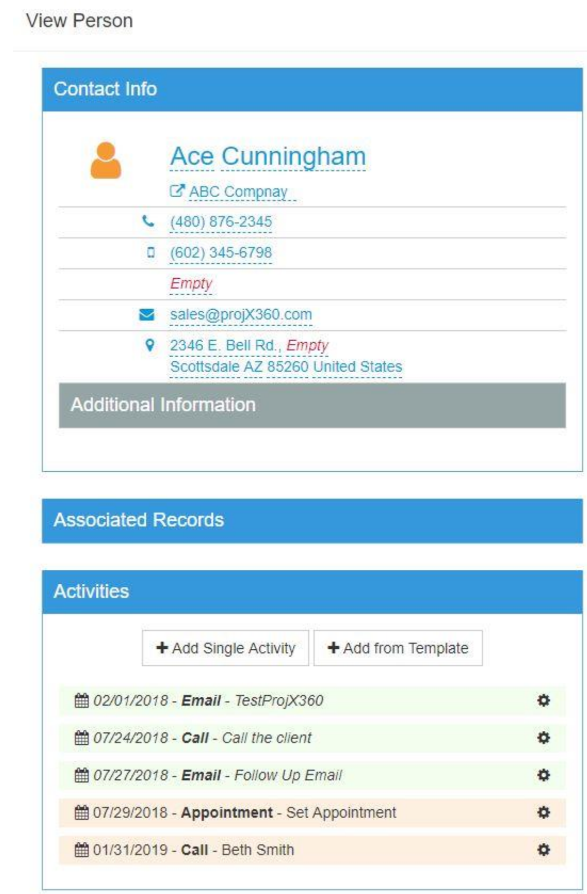
Task and Event Types let sales track specific types of activities as they are created. You can run a CRM Activities Report. You can edit the default types below or add new ones. The first one on the list will be the default selection when a new Task or Event is created.

To-Do Templates

A To-Do Template is a series of Tasks that Sales can apply to People. Create, Edit or Delete your templates below.




Task & Event Types
To-Do Templates
A To-Do Template is a series of Tasks that you can apply to People.
Create, Edit or Delete your templates below.
TEMPLATE NAME
Deals - Sales Template
Sales Process
Test
Test SoundCheck
Add New Template


View Person
Contact Info
Ace Cunningham
ABC Compnay
(480) 876-2345
(602) 345-6798
Empty
sales@projX360.com
2346 E. Bell Rd., Empty
Scottsdale AZ 85260 United States
Additional Information
Associated Records
Activities
Add Single Activity
Add from Template
02/01/2018 - Email - TestProjX360
07/24/2018 - Call - Call the client
07/27/2018 - Email - Follow Up Email
07/29/2018 - Appointment - Set Appointment
01/31/2019 - Call - Beth Smith

Statuses


Statuses
Statuses help you sort and prioritize your relationships. You can edit the default statuses below or add new ones.
STATUS
COLOR
Hot
Cold
Warm
Follow-up
Archived

Sources

Sources

A source helps you understand which marketing programs are driving your business. You will also be able to track Return on Investment (ROI) using sources.

You can edit the default sources below or add new ones.

SOURCE	COST	
Chavaz Design	$0.00	
Eagle Custom Homes	$0.00	
JM Wall Development	$0.00	
Magazine Advertising	$25,000.00	
None	$0.00	default
Referral	$0.00	

Tags

Tags

Tags allow you to associate keywords with Companies and People, so you can tag your relationships by any attribute that's useful to you.

You can edit the default tags below or add new ones.

TAG	
Existing Builder	
Existing Customer	
New Builder	
New Customer	
Pits. PD	

Deal Stages

Deal Stages | Deal Loss Reasons

Deal Stages

Deal Stages allow you to define your sales process. A probablity is associated with each stage and indicates how likely a deal is to close. Use the default deal stages or you can customize the sales process by editing and adding new stages.

DEAL STAGE	PROBABILITY	
Lost	0	default
Qualified	10	
Request for Information	25	
Presentation	50	
Negotiation	75	
Won	100	default

Deal Lost Reasons

Deal Stages | Deal Loss Reasons

Deal Loss Reasons

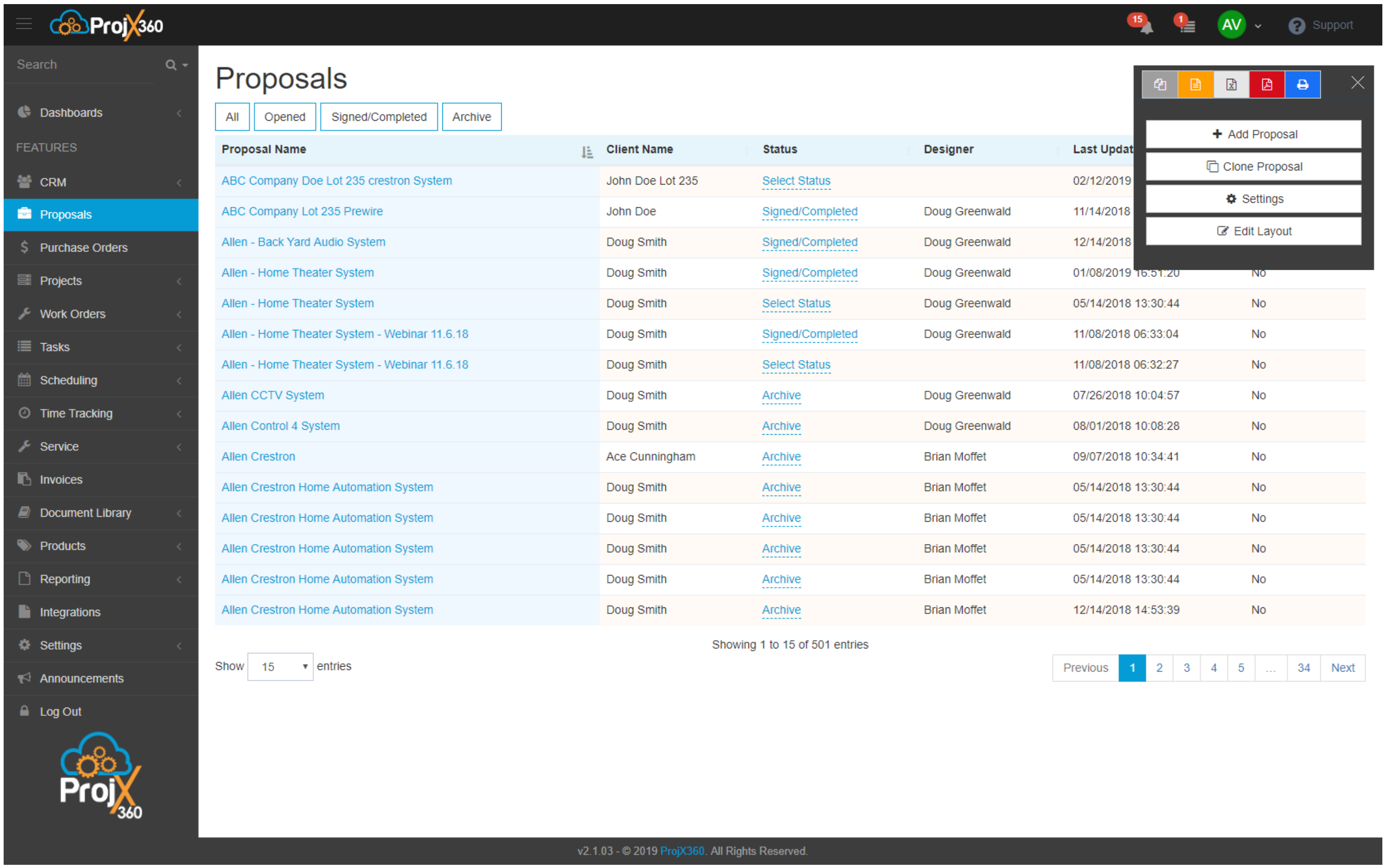
Manage the reasons why a deal was lost so you can report on it later and refine your sales process as needed.

Reason	
No Reason	
Bad Contact Info	
Unable to Contact	
Loss of Interest	
Competitor	
Lack of Follow-Up	

Proposal

Proposal Settings

Modify your global Proposal Setting for pricing rules, locations, systems, payment schedules, contracts, and scope of work templates so these are available for any new proposal that you create.

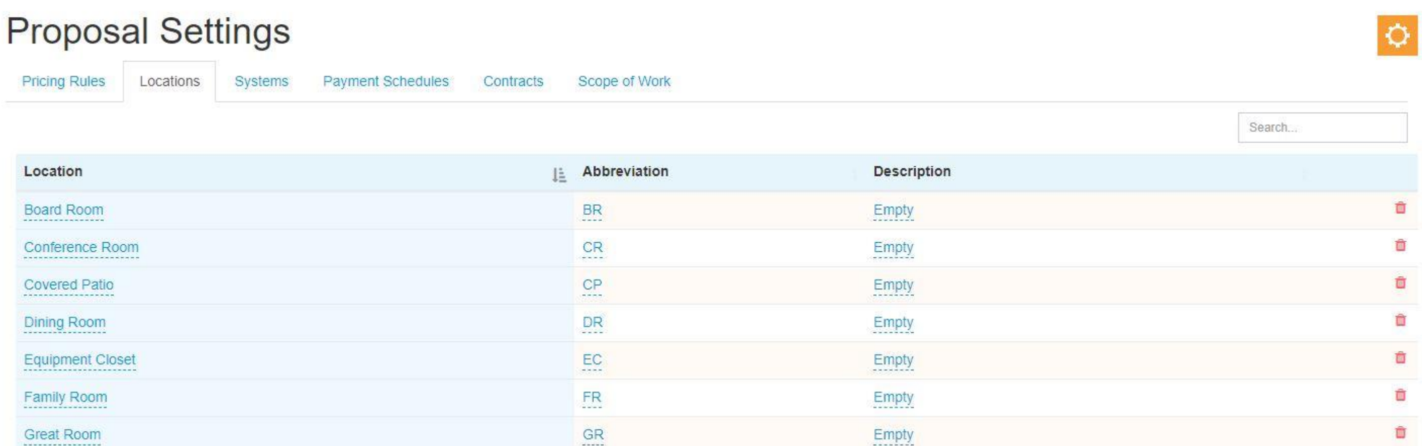


Pricing Rules

Click the orange cogwheel to “+ Add Pricing Rule”. A new entry will be added for you to adjust the Rule Name and Discount or Addition. Click the trash can icon to delete any pricing rules you are not using.

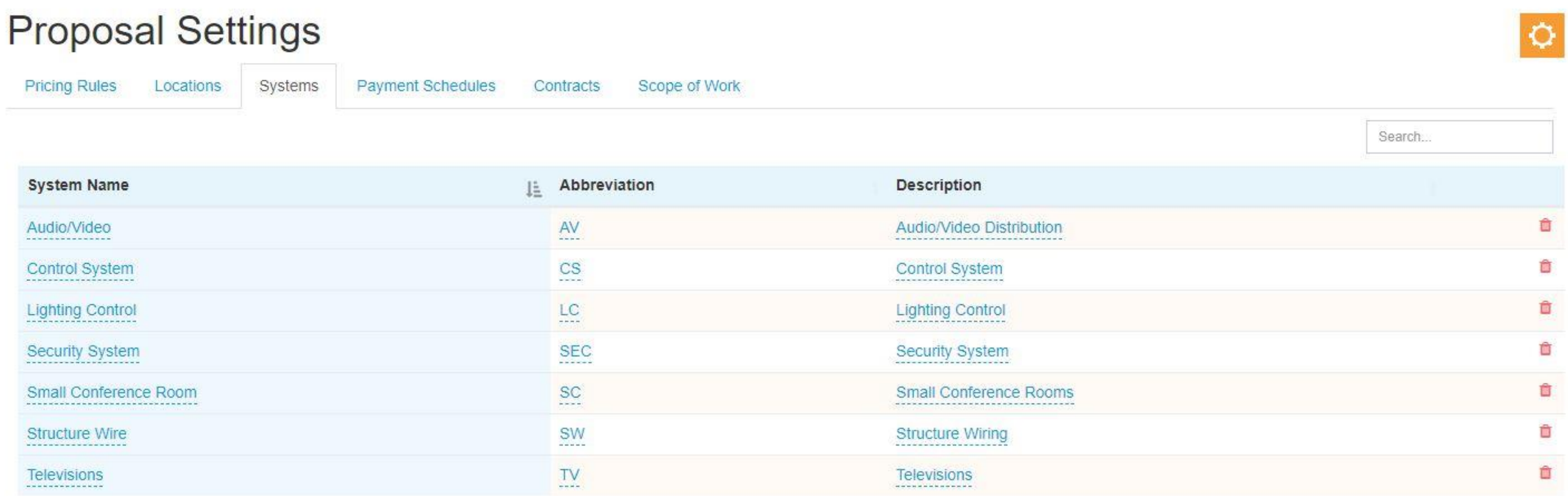
Locations

Click the orange cogwheel to “+ Add Location”. A new entry will be added for you to adjust the Location, Abbreviation and Description.



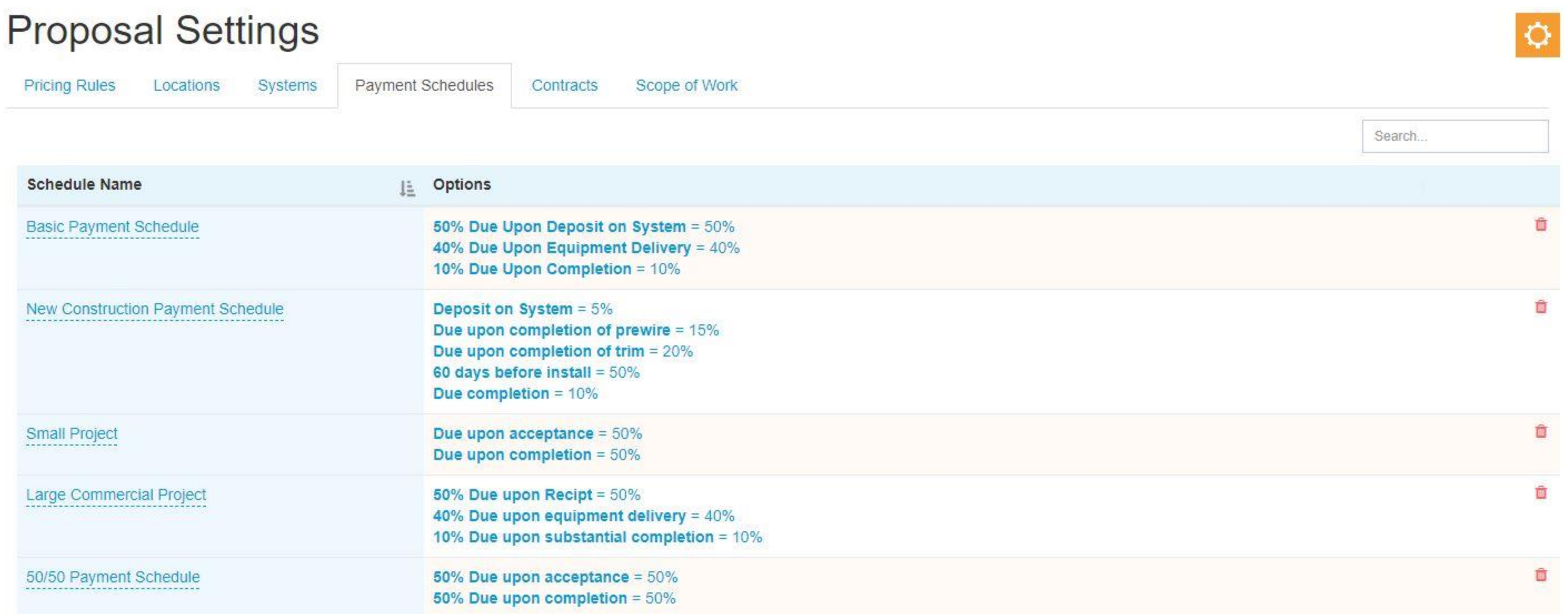
Systems

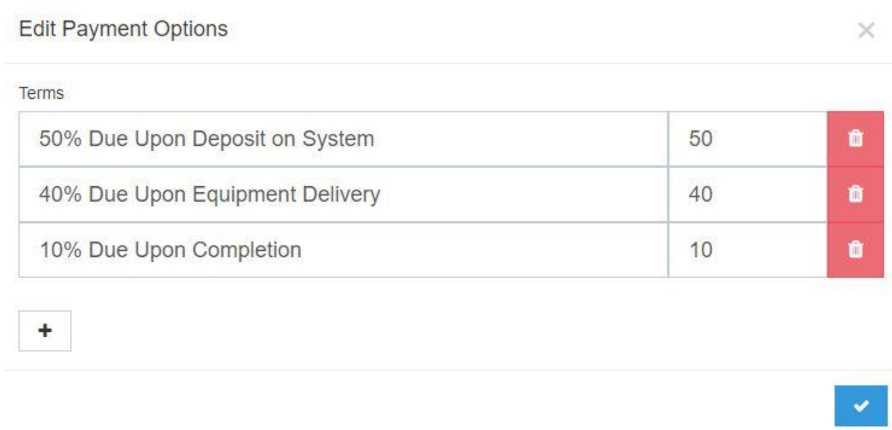
Click the orange cogwheel to “+ Add System”. A new entry will be added for you to adjust the System, Abbreviation and Description.



Payment Schedules

Click the orange cogwheel to “+ Add Payment Schedule”. A new entry will be added for you to adjust the Schedule Name and Options.



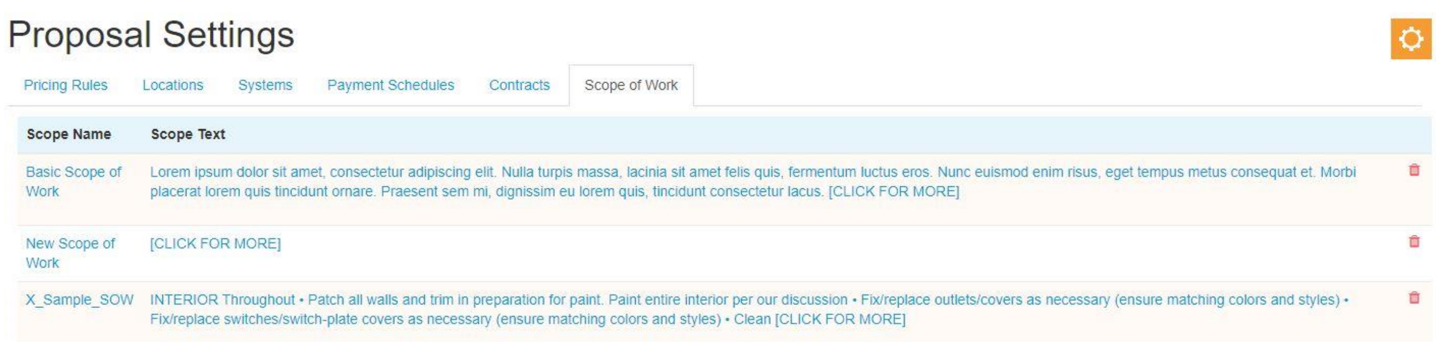


Contracts

Click the orange cogwheel to “+ Add Contract”. A new entry will be added for you to adjust the Contract Name and Contract Text. **Note:** Contract will appear at the very bottom of a proposal where they are able to sign.

Scope of Work

Click the orange cogwheel to “+ Add Scope of Work”. A new entry will be added for you to adjust the Scope Name and Scope Text. **Note:** Scope of Work will appear after the cover page details in your proposal.



Projects

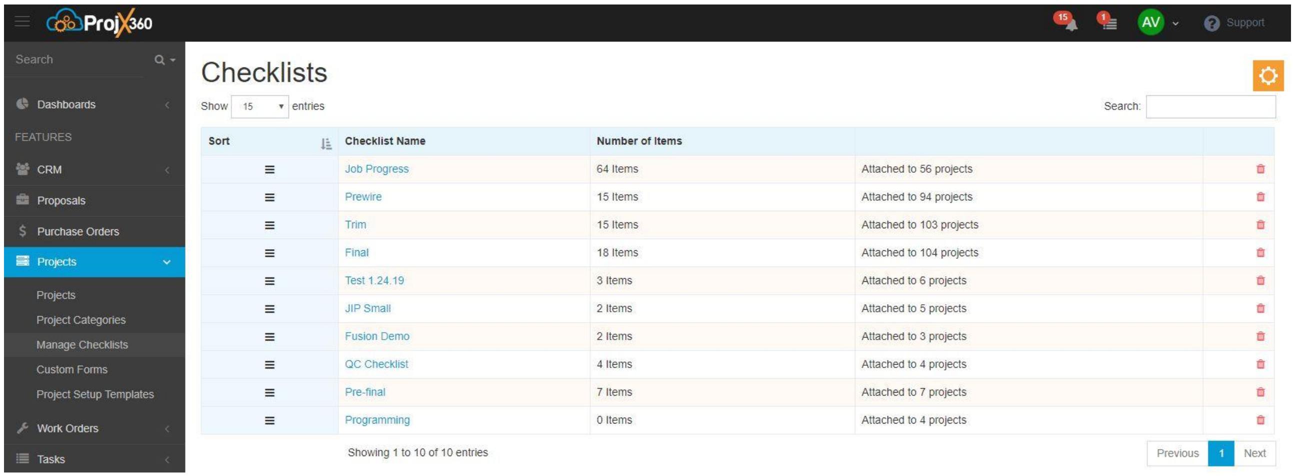
Before you start adding in new projects be sure to have your Project Categories, Checklists, Custom Forms and Project Setup Templates ready to go. This will speed up the project creation process.

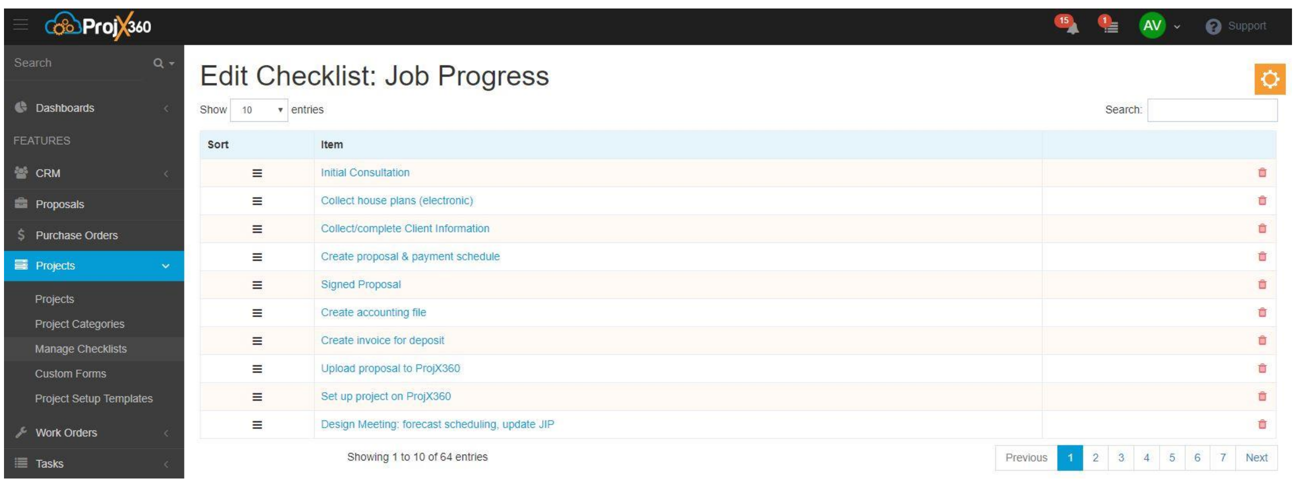
Project Categories

Add New project categories to filter down by category on your projects overview page. Click the orange cogwheel, "+ New Category" to add a new entry.

Manage Checklists

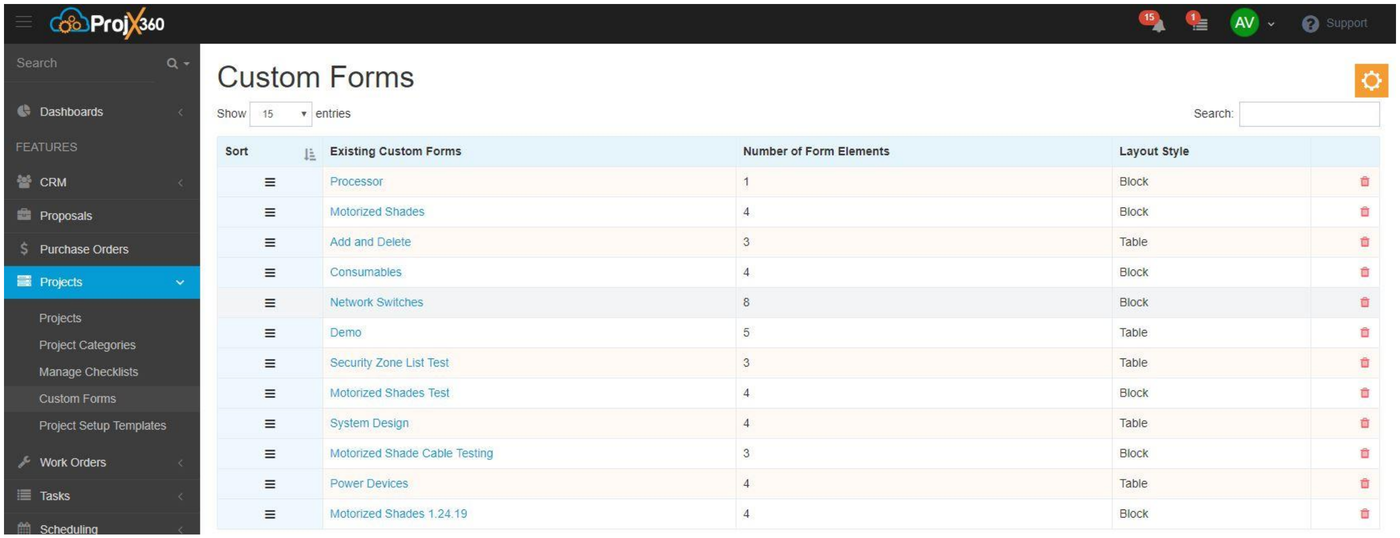
Create custom checklist and apply them to your projects. Click the orange cogwheel, “+ Add New Checklist”. Type in your Checklist Name and save. Click on your Checklist Name. Click the orange cogwheel, “+ Add New Checklist Item”. Add as many checklist items as you need. You can drag and drop the sort order if needed and delete any items you are no longer using by clicking on the trash can icon.

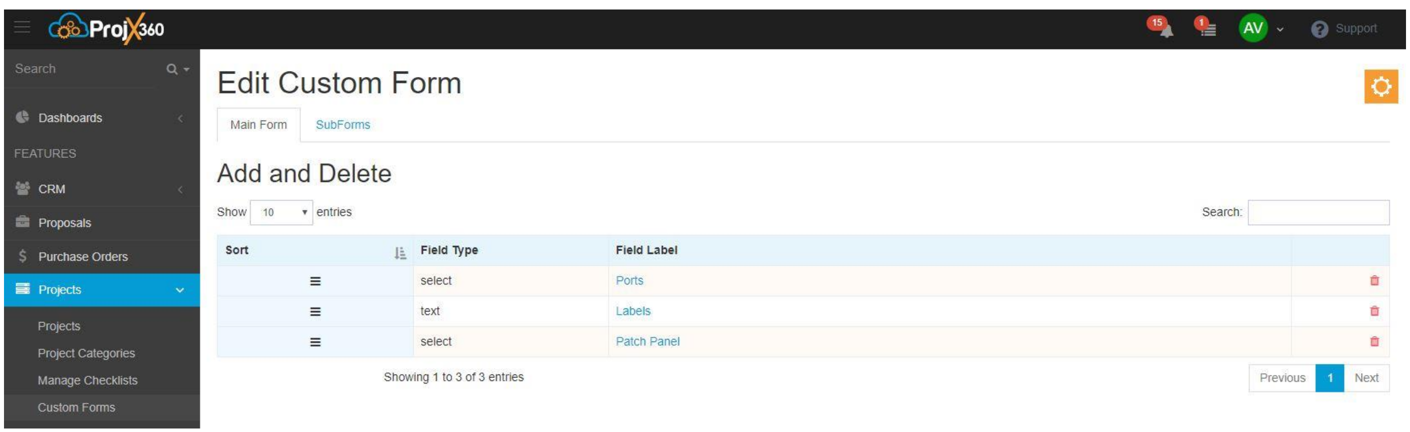




Custom Forms

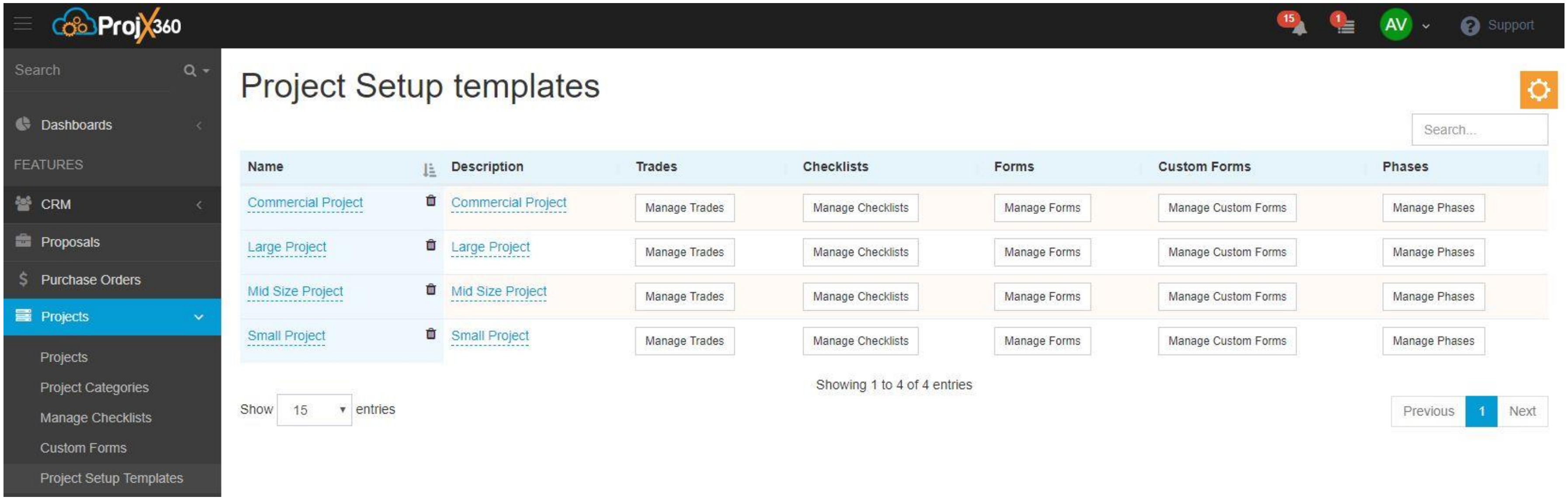
Create custom forms and apply to your projects. Click the orange cogwheel, “+ Add New Custom Form”. Type in your Custom Form Name, form layout and choose if the form is repeatable, click save. Click on your Existing Custom Forms Name. Click the orange cogwheel, “+ Add New Form Element”. Add as many items as you need by entering in field labels and choosing a field type (text, textarea, tel, email, select). You can drag and drop the sort order if needed and delete any items you are no longer using by clicking on the trash can icon.





Project Setup Templates

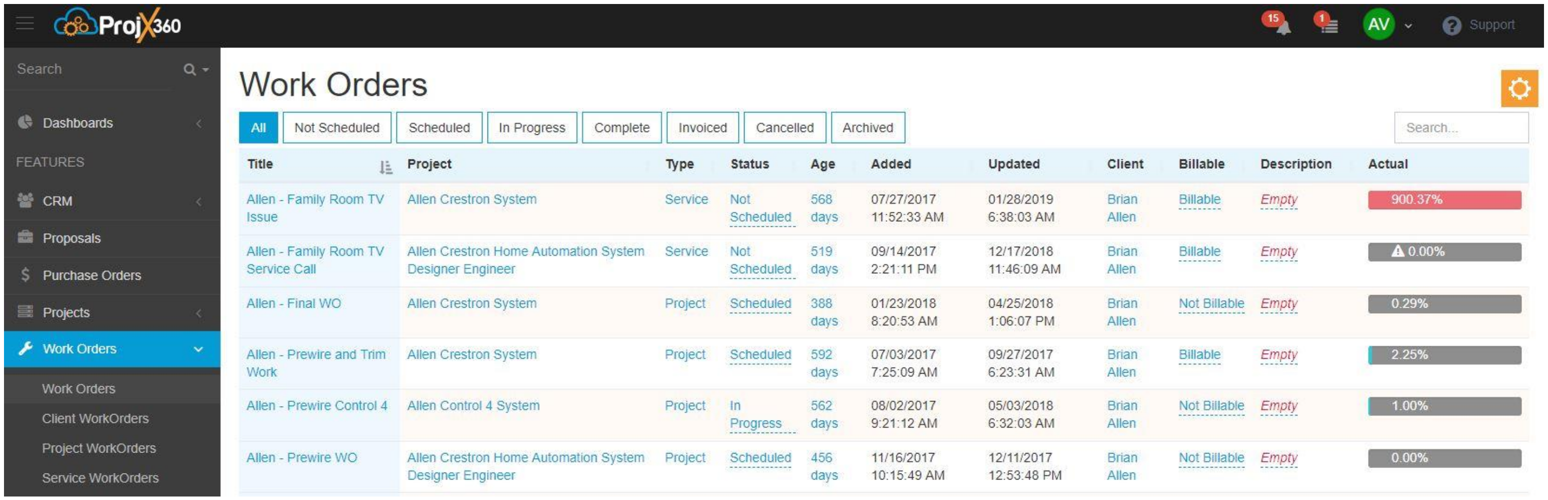
Creating templates will allow you to carry over any settings you choose for trades, checklists, forms, custom forms and phase to your projects. If you choose not to set up templates you will have to manually select what will apply to each project.



Work Orders

A to do list for your technicians as they are completing WO line items by phase. There are 3 types of WO's

- **Client:** Small one off jobs. Can't time track. Don't recommend.
- **Project:** Large scale Projects you are working on throughout the project.
- **Service:** Service calls, finished projects, past clients.

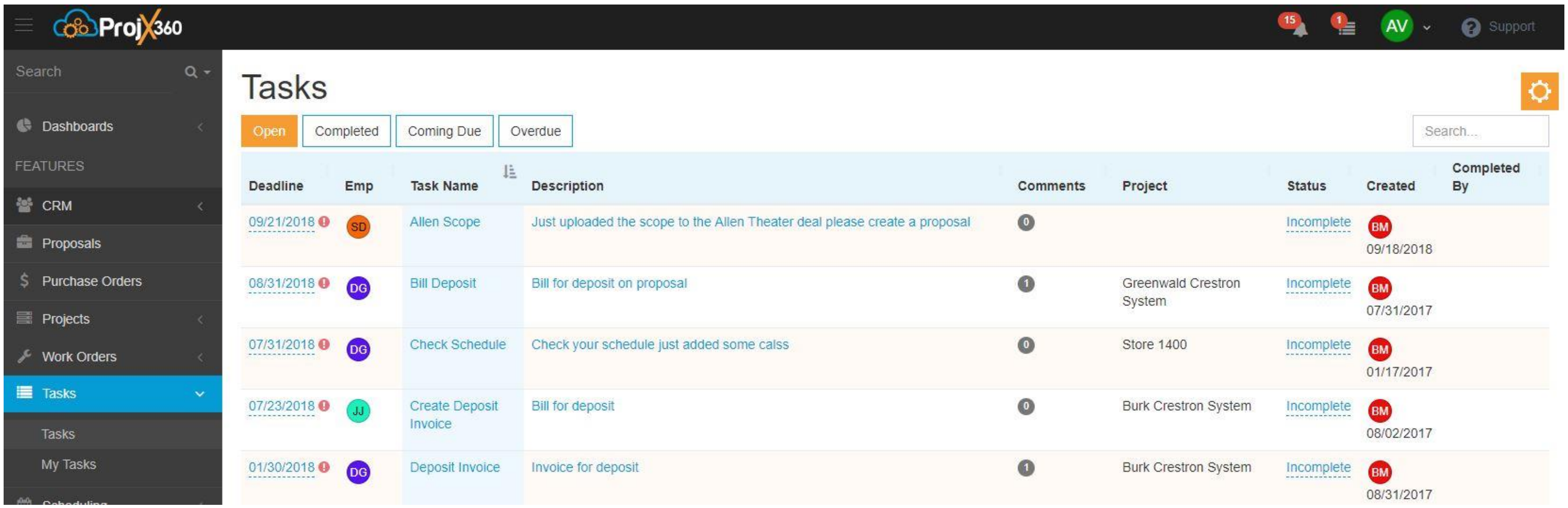


Tips

- When adding a new WO select status as "Not Scheduled". This will be helpful when scheduling your WO. Go to Scheduling and the WO you just set to "Not Scheduled" will show up along the left side under "Unscheduled Service WO or Unscheduled Project WO".
- If you want to time track a project is required. If you have Client WO (small one off jobs) that you do not want to time track for you can just create one Project (Example: ProjX360 Service Projects) and log all your WO's under that so your skipping the step of having to create a new project each time. Keep in mind if you want to log all of your network information or any custom forms that you created per WO it's best to create a project so everything will reside under that one project.
- Click on column headers to sort data.
- Utilize the "Search…" feature to narrow results.
- You can toggle between your WO status by clicking between the tabs. (All, Not Scheduled, Scheduled, In Progress, Complete, etc.).
- Show "15" entries will display. If you need to show more results change this and it will save your page setting.

Tasks

Create and assign tasks within a project quickly and easily. Click the orange cogwheel “+ Add New Task”. Tasks can be assigned to one employee on your team with due dates to be sure time sensitive tasks are completed on time. Email alerts are generated by ProjX360 if the employee is setup to receive notifications under employee settings. to ensure the employee is alerted when a new task is assigned to them. Follow-up alerts are also sent as the due dates are approaching if the task has not been completed. Notes can be attached to each task to track important information.

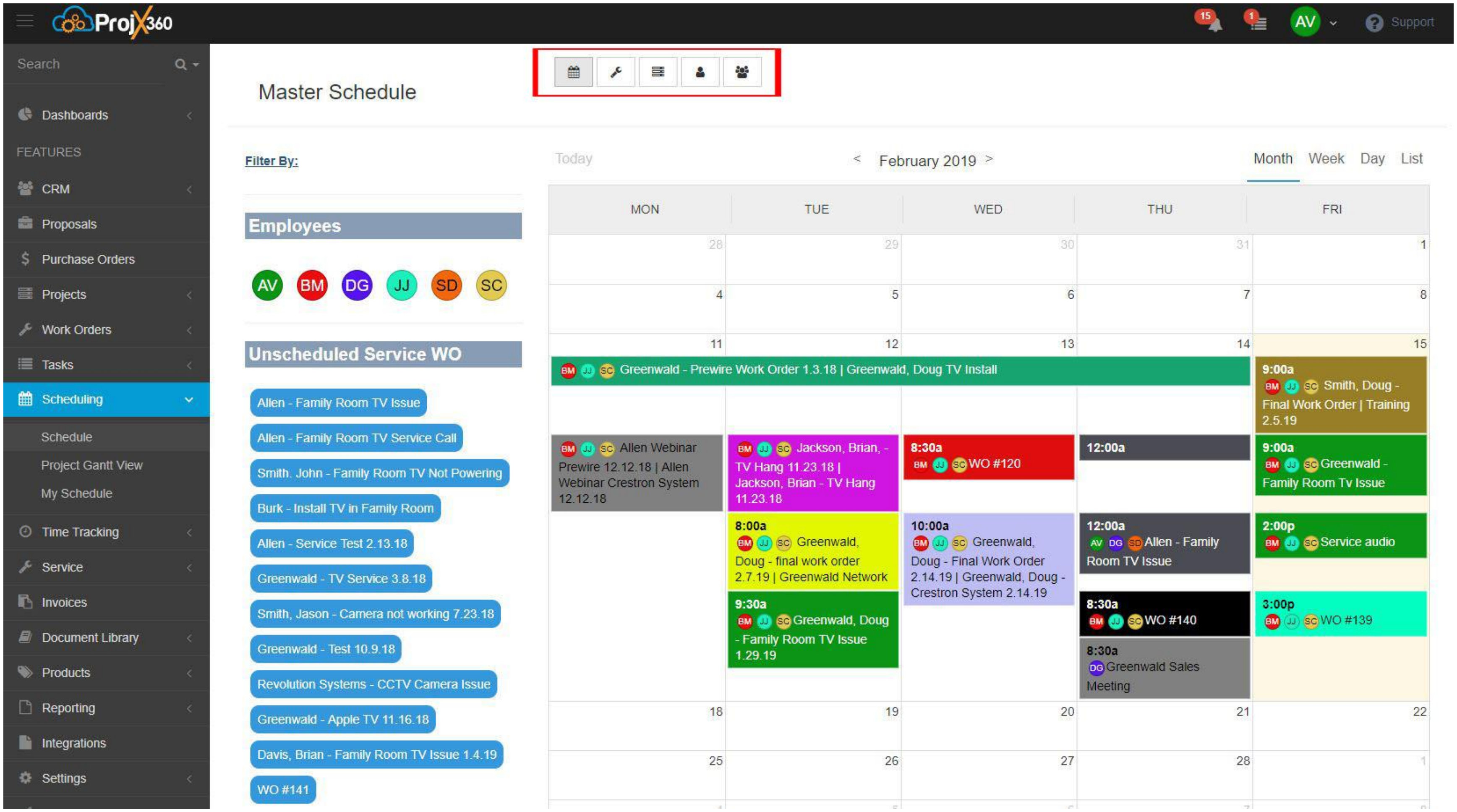


Tips

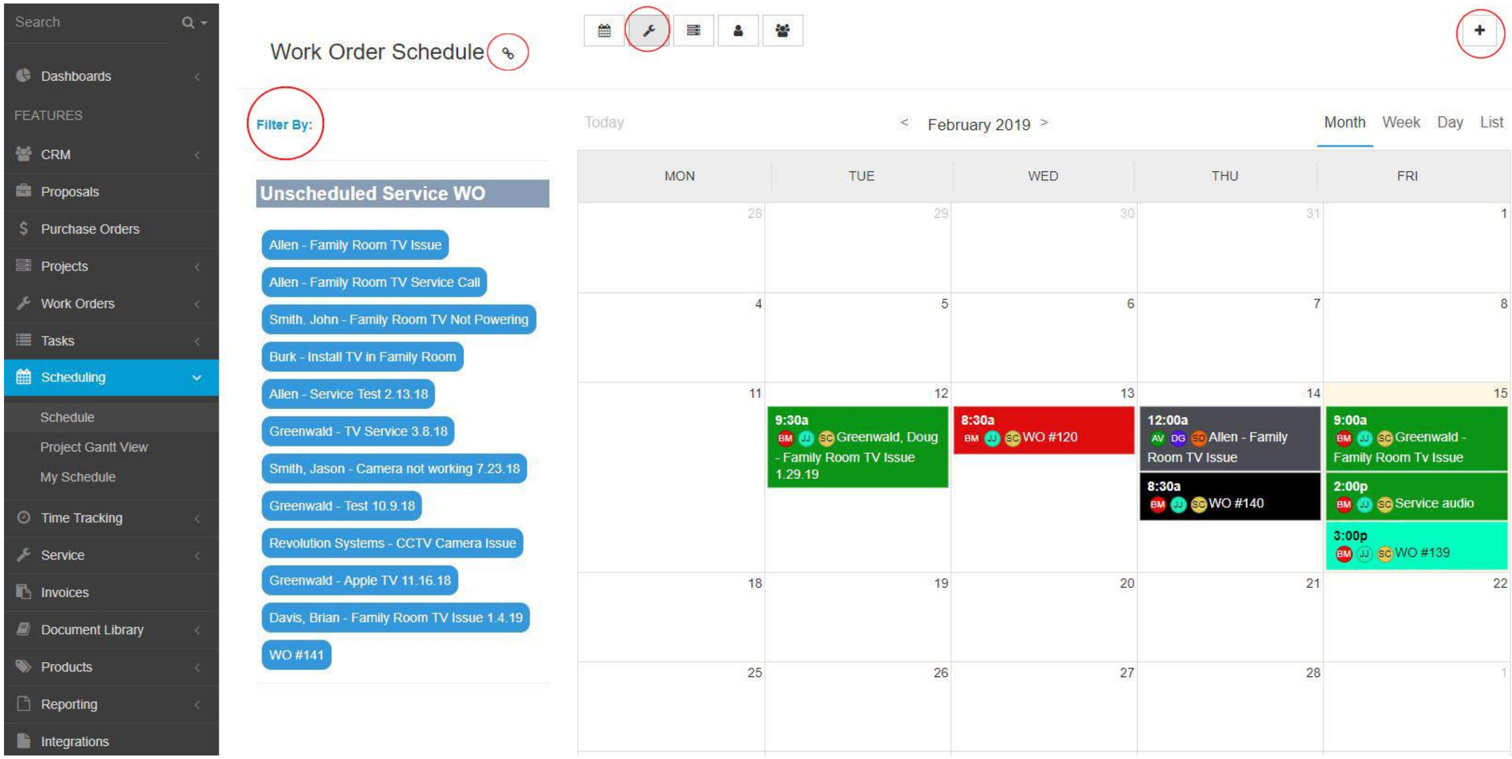
- When adding a new task a project is not a required field. Leave blank if it’s a task not associated to a project.
- Task can only be assigned to “one” employee. This is because if multiple people are on a task then which person is responsible to complete the task? Utilize project discussions if more than one person needs to be updated with project information.

Scheduling

You can adjust which calendar displays by using the icons along the middle (outlined in red). (Master Calendar, Service WO, Project WO, Employee Schedules, CRM Calendar).



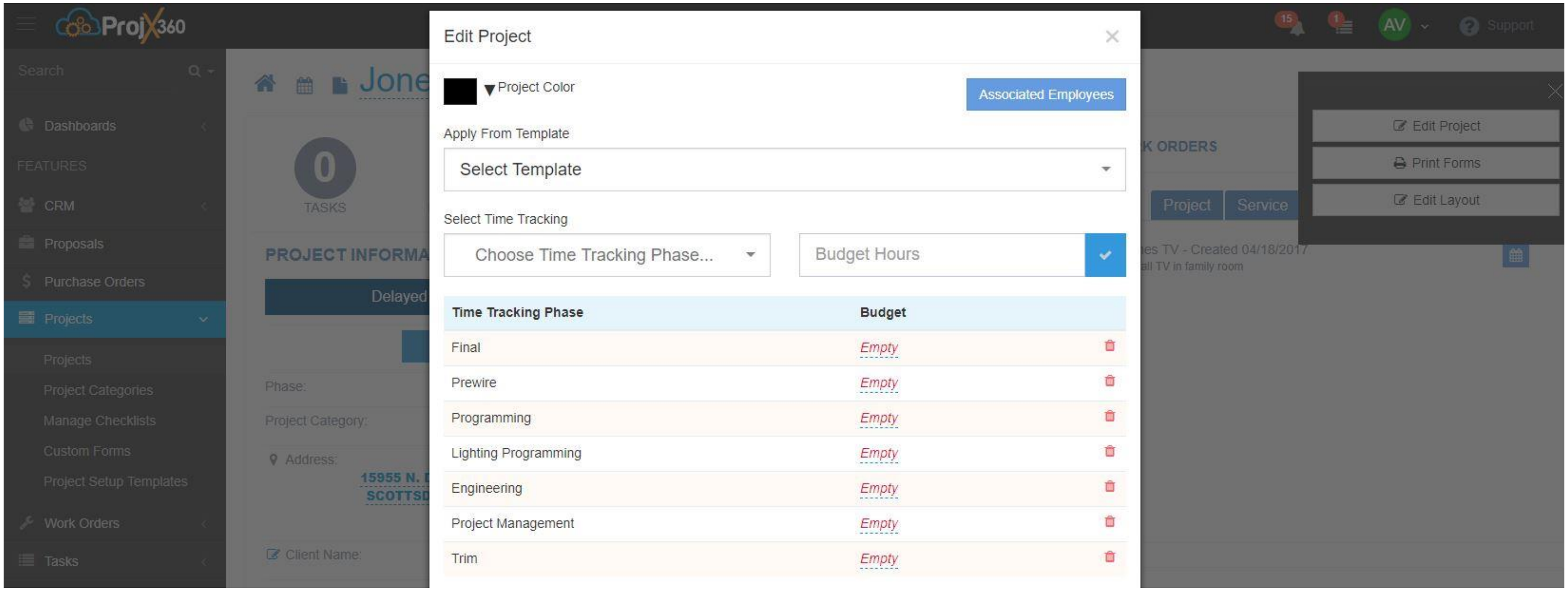
- In order to see the options shown circled in red make sure you click on any other calendar icon along the middle besides the Master Calendar. The one circled in red below is the Service WO calendar. To the right of the Work Order Schedule title you will see a chain icon link. Clicking on the chain link will provide an iCal link allowing you to subscribe to the calendar on other devices and programs. Simply copy the URL and follow the instructions we provide for Outlook, Apple or Google. Finally over the right side we show circled in red a “+” symbol. This will allow you to add any event to the schedule.



Tips

- When clicking “+” to add a new event a Project or Work Order is not required. You can leave those fields blank and add any event to the schedule. While on the same screen you can click on any employee initials and see their work utilization.
- Click Filter By to narrow down results by employees, projects and dates.

Time Tracking

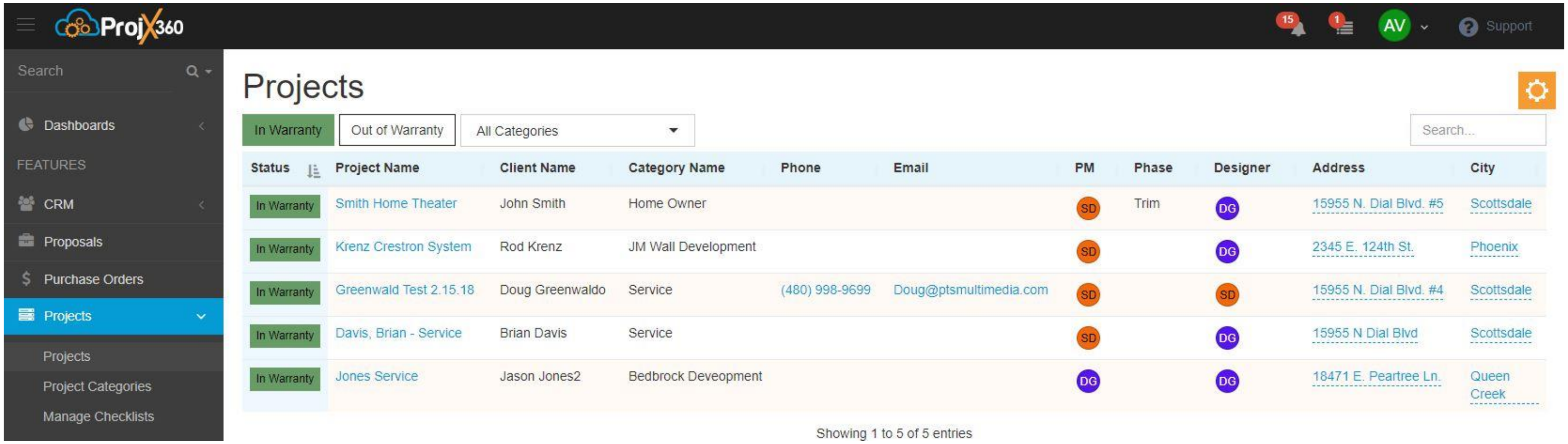


Tips

- If your technicians are not able to clock into any phases from the WO make sure you have set time tracking phases. Go to Projects, click into the project you would like to add time tracking phases to, click the orange cogwheel, “Edit Project”. You will see the pop up modal above.
- On a mobile device if a technician is not able to sign in confirm you have the correct app settings.
  URL of ProjX360 Install (Example): https://pjx.projx360.com. Make sure you are using https and make sure you don’t have / on the end.
  Username and Password fields: Same credentials you login to desktop with.

Service

Manage your Service Projects, Service Workorders, Repair Tracking.

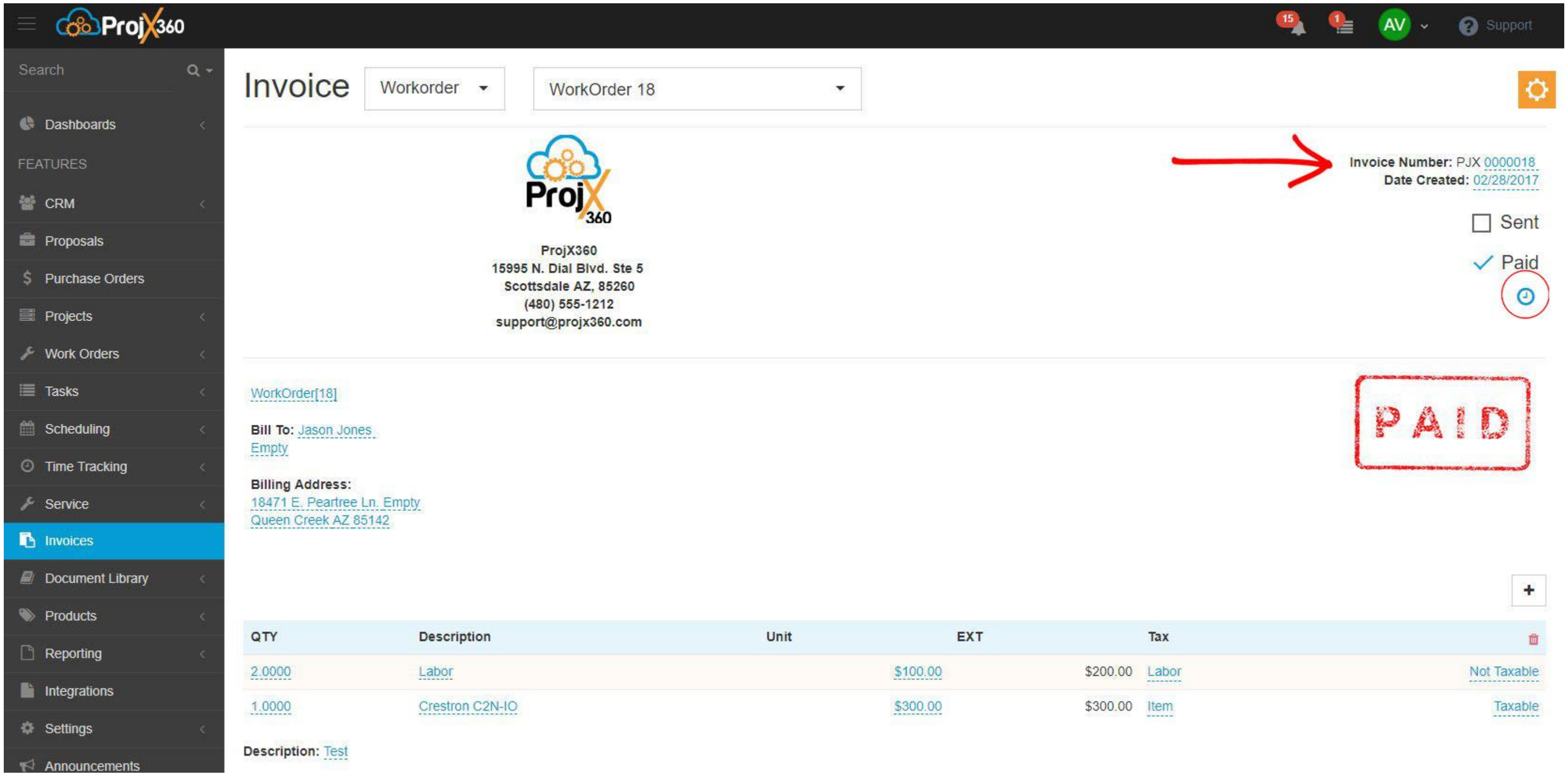


Tips

- You will notice the status is set to show “In Warranty” and “Out of Warranty”. As previously stated under ProjX360 Configuration you can adjust all other project status names as needed but keep In Warranty and Out of Warranty as is unless you have a similar name for them. Changing the names to something different does not change the functionality for how it is intended to work. Once a project status is changed to In Warranty/Out of Warranty that triggers the project to move to our Service Project area as shown in the screenshot. At any point you can adjust the status and that will filter back to the main projects page if it’s no longer in/out of warranty.

Invoices

Work Order, Project or CRM

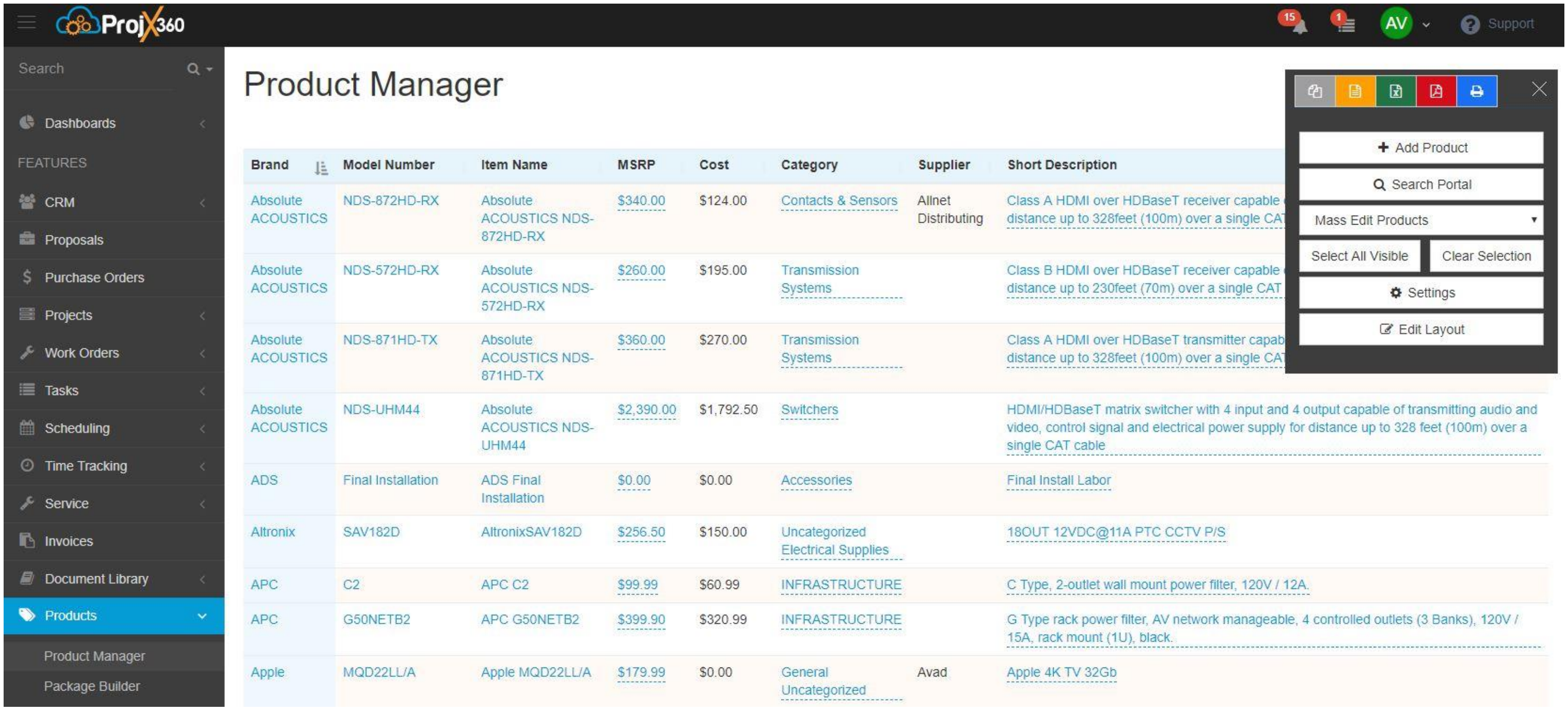


Tips

- You can adjust the invoice number if needed. The "PJX" prefix can be changed under Settings - Configuration.
- If there are billable hours from the WO you will see a time clock icon. Click that to invoice time from the WO.

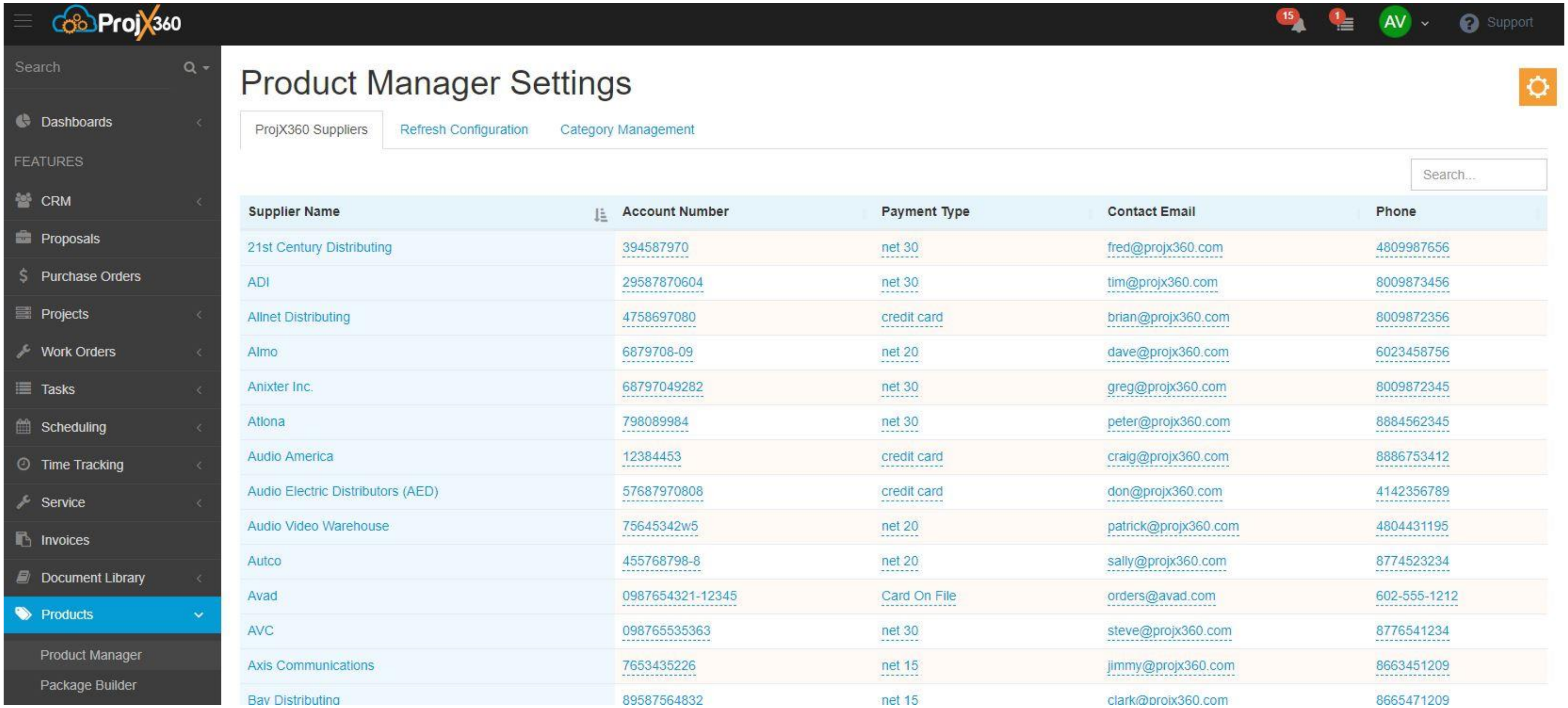
Products

Add product, Search Portal, Mass Edit Products, Settings and Package Builder.



Tips

- While mass editing products hold Ctrl while clicking on each product you want to mass edit. This will allow individual selection of product.
- **ProjX360 Suppliers** - Click the orange cogwheel, “Settings” to add new suppliers. ProjX360 Suppliers will be the 1st tab. Click the orange cogwheel, “+ New Supplier”.
- **Category Management** - Click the orange cogwheel, Settings. Click the tab “Category Management”. Click the orange cogwheel, + New Category” to add. Having categories will be helpful to narrow down what you are looking for in our proposal builder.



Supplier Name	Account Number	Payment Type	Contact Email	Phone
21st Century Distributing	394587970	net 30	fred@projx360.com	4809987656
ADI	29587870604	net 30	tim@projx360.com	8009873456
Allnet Distributing	4758697080	credit card	brian@projx360.com	8009872356
Almo	6879708-09	net 20	dave@projx360.com	6023458756
Anixter Inc.	68797049282	net 30	greg@projx360.com	8009872345
Atlona	798089984	net 30	peter@projx360.com	8884562345
Audio America	12384453	credit card	craig@projx360.com	8886753412
Audio Electric Distributors (AED)	57687970808	credit card	don@projx360.com	4142356789
Audio Video Warehouse	75645342w5	net 20	patrick@projx360.com	4804431195
Autco	455768798-8	net 20	sally@projx360.com	8774523234
Avad	0987654321-12345	Card On File	orders@avad.com	602-555-1212
AVC	098765535363	net 30	steve@projx360.com	8776541234
Axis Communications	7653435226	net 15	jimmy@projx360.com	8663451209
Bay Distributing	89587564832	net 15	clark@projx360.com	8665471209