



**Toll Free:** 1-844-688-5584  
**Email:** [support@projx360.com](mailto:support@projx360.com)  
**Live Chat:** <https://projx360.com>

## **Getting Started**

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## Starting Tips

- Email your company logo to [support@projx360.com](mailto: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](mailto:support@projx360.com) or use live chat on our website [projx360.com](https://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](mailto: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](https://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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ProjX360

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](mailto: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 \(United States\)](#)

Gantt Colors

Time Off

Meeting

Other

Project Statuses

This Week

Next Week

In Progress

Delayed

In Warranty

Out of Warranty

Completed/Archive

Integration/API Configuration

Portal Key: [/RkTRrqiYFSu/zyuZYkmtMQycxmdppKEDsgUO+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

Enter your Business Hours below for Scheduling.

SUN

MON

TUE

WED

THU

FRI

SAT

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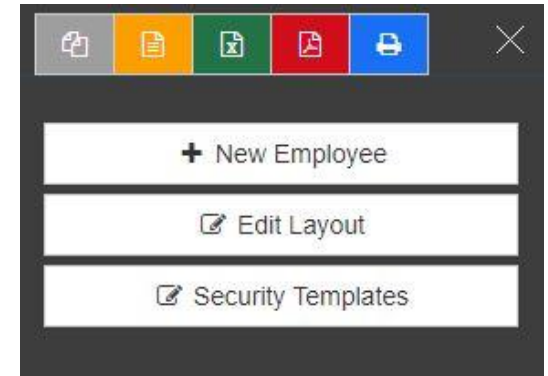
## Employees

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.



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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

Previous

1

Next

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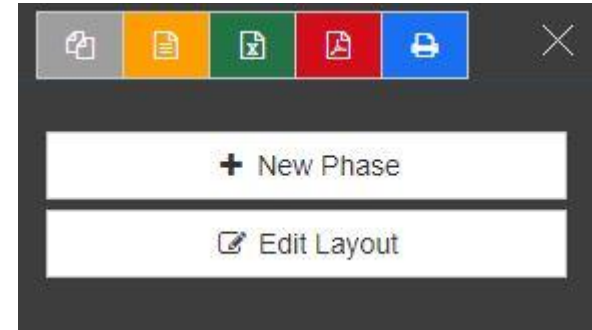
## Phases

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.

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Phases

Active

Inactive

Search...

Phase Name	Cost/hr	Price/hr	Active
<a href="#">Engineering</a>	\$50.00	\$100.00	<a href="#">Active</a>
<a href="#">Final</a>	\$40.00	\$85.00	<a href="#">Active</a>
<a href="#">Lighting Programming</a>	\$60.00	\$115.00	<a href="#">Active</a>
<a href="#">Prewire</a>	\$40.00	\$85.00	<a href="#">Active</a>
<a href="#">Programming</a>	\$60.00	\$115.00	<a href="#">Active</a>
<a href="#">Project Management</a>	\$50.00	\$85.00	<a href="#">Active</a>
<a href="#">Service</a>	\$50.00	\$100.00	<a href="#">Active</a>
<a href="#">Trim</a>	\$40.00	\$85.00	<a href="#">Active</a>
<a href="#">Warranty</a>	\$50.00	\$0.00	<a href="#">Active</a>

Show

15

entries

Showing 1 to 9 of 9 entries

Previous

1

Next

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## 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.

The screenshot displays the 'Tax Settings' page in the ProjX360 application. The page features a table with the following data:

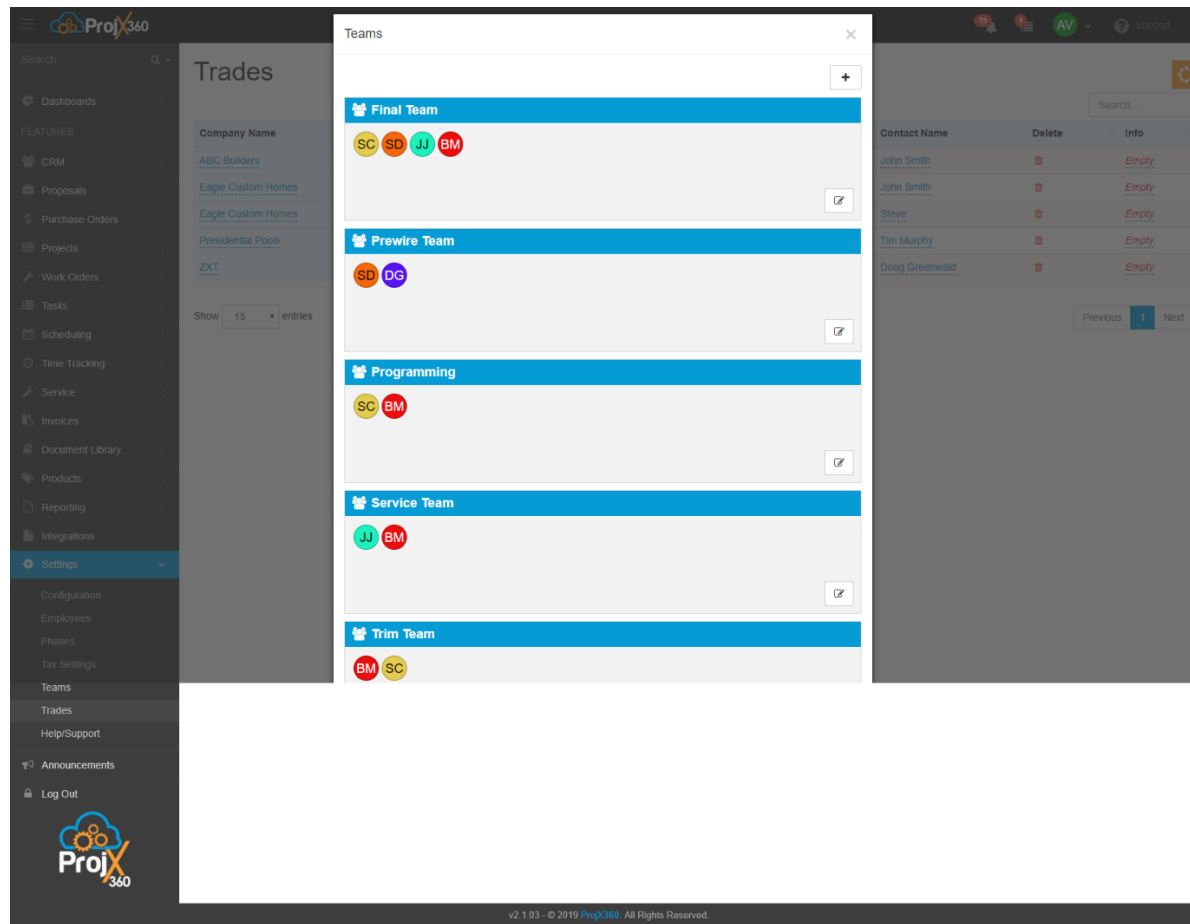
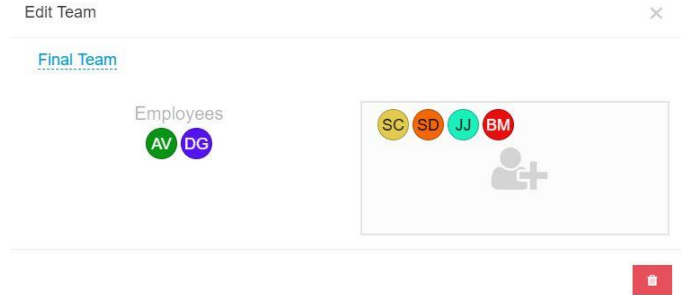
Tax Type	Tax Setting Name	Tax Rate	Delete
Equipment Tax	Sales Tax	7.9500	
Equipment Tax	Chandler Tax	9.5000	
Equipment Tax	Scottsdale	6.9500	
Labor Tax	Labor	5.0000	
Equipment & Labor Tax	Sales Tax	4.5000	

Below the table, there is a 'Showing 1 to 5 of 5 entries' indicator and a pagination control with 'Previous', '1', and 'Next' buttons. The left sidebar shows a navigation menu with 'Settings' selected, and the bottom footer displays the ProjX360 logo and version information: 'v2.1.01 - © 2019 ProjX360. All Rights Reserved.'

## Teams

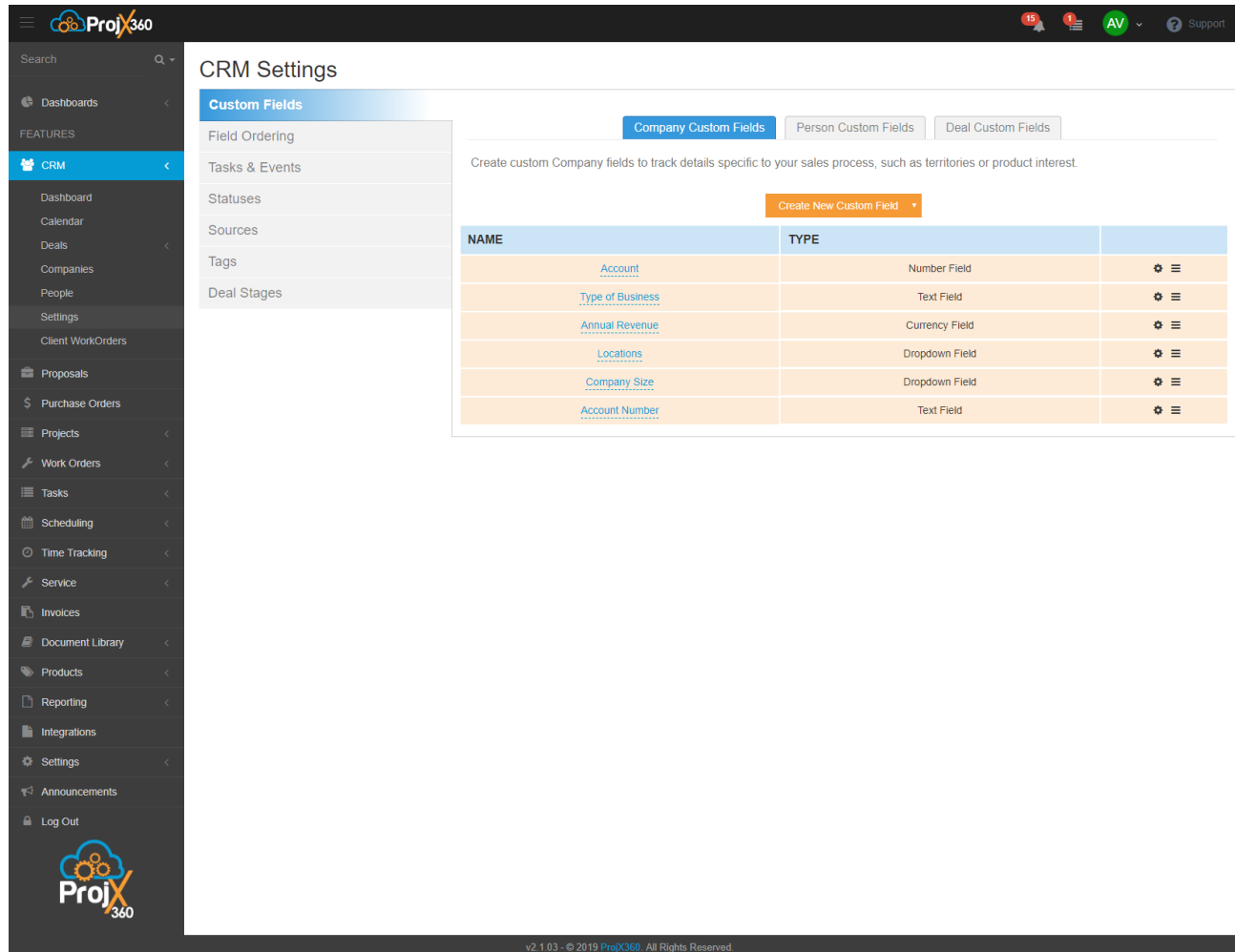
Add or Edit existing teams for scheduling.

- **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.



The screenshot displays the ProjX360 CRM Settings interface. The left sidebar contains a navigation menu with options like Dashboards, CRM, Settings, and various business tools. The main content area is titled "CRM Settings" and features a "Custom Fields" section. This section includes tabs for "Company Custom Fields", "Person Custom Fields", and "Deal Custom Fields". Below the tabs, there is a description: "Create custom Company fields to track details specific to your sales process, such as territories or product interest." and a "Create New Custom Field" button. A table lists existing custom fields with columns for NAME, TYPE, and a settings icon.

NAME	TYPE	
Account	Number Field	⚙️
Type of Business	Text Field	⚙️
Annual Revenue	Currency Field	⚙️
Locations	Dropdown Field	⚙️
Company Size	Dropdown Field	⚙️
Account Number	Text Field	⚙️

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## Custom Fields

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

Company Custom Fields

Person Custom Fields

Deal Custom Fields

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

Create New Custom Field ▾

NAME	TYPE	
<a href="#">Account</a>	Number Field	⚙️ ≡
<a href="#">Type of Business</a>	Text Field	⚙️ ≡
<a href="#">Annual Revenue</a>	Currency Field	⚙️ ≡
<a href="#">Locations</a>	Dropdown Field	⚙️ ≡
<a href="#">Company Size</a>	Dropdown Field	⚙️ ≡
<a href="#">Account Number</a>	Text Field	⚙️ ≡

## 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.

<div>Company Field Ordering</div> <div>Person Field Ordering</div> <div>Deal Field Ordering</div>		
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

### Task & Event Types +

Task and Event Types let you track specific types of activities as they are scheduled onto calendars, so you can report on them later.

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.

TYPE	
<a href="#">Appointment</a>	 
<a href="#">Email</a>	 
<a href="#">Call</a>	 
<a href="#">To-do</a>	 
<a href="#">Schedule Meeting</a>	 

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 Company](#)

(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	
<a href="#">Hot</a>	 ▼	 
<a href="#">Cold</a>	 ▼	 
<a href="#">Warm</a>	 ▼	 
<a href="#">Follow-up</a>	 ▼	 
<a href="#">Archived</a>	 ▼	 

## 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	
<a href="#">Chavaz Design</a>	<a href="#">\$0.00</a>	
<a href="#">Eagle Custom Homes</a>	<a href="#">\$0.00</a>	
<a href="#">JM Wall Development</a>	<a href="#">\$0.00</a>	
<a href="#">Magazine Advertising</a>	<a href="#">\$25,000.00</a>	
<a href="#">None</a>	<a href="#">\$0.00</a>	default
<a href="#">Referral</a>	<a href="#">\$0.00</a>	

## 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	
<a href="#">Existing Builder</a>	
<a href="#">Existing Customer</a>	
<a href="#">New Builder</a>	
<a href="#">New Customer</a>	
<a href="#">Pits. PD</a>	

## Deal Stages

Deal Stages		
Deal Stages		
Deal Loss Reasons		
Deal Stages		
Deal Stages allow you to define your sales process. A probability 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	
<a href="#">Lost</a>	0	default
<a href="#">Qualified</a>	10	
<a href="#">Request for Information</a>	25	
<a href="#">Presentation</a>	50	
<a href="#">Negotiation</a>	75	
<a href="#">Won</a>	100	default

## Deal Lost Reasons

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	
<a href="#">No Reason</a>	
<a href="#">Bad Contact Info</a>	
<a href="#">Unable to Contact</a>	
<a href="#">Loss of Interest</a>	
<a href="#">Competitor</a>	
<a href="#">Lack of Follow-Up</a>	

# 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.

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Proposals

AllOpenedSigned/CompletedArchive

Proposal Name	Client Name	Status	Designer	Last Update	
ABC Company Doe Lot 235 crestron System	John Doe Lot 235	Select Status		02/12/2019	
ABC Company Lot 235 Prewire	John Doe	Signed/Completed	Doug Greenwald	11/14/2018	
Allen - Back Yard Audio System	Doug Smith	Signed/Completed	Doug Greenwald	12/14/2018	
Allen - Home Theater System	Doug Smith	Signed/Completed	Doug Greenwald	01/08/2019 16:51:20	No
Allen - Home Theater System	Doug Smith	Select Status	Doug Greenwald	05/14/2018 13:30:44	No
Allen - Home Theater System - Webinar 11.6.18	Doug Smith	Signed/Completed	Doug Greenwald	11/08/2018 06:33:04	No
Allen - Home Theater System - Webinar 11.6.18	Doug Smith	Select Status		11/08/2018 06:32:27	No
Allen CCTV System	Doug Smith	Archive	Doug Greenwald	07/26/2018 10:04:57	No
Allen Control 4 System	Doug Smith	Archive	Doug Greenwald	08/01/2018 10:08:28	No
Allen Crestron	Ace Cunningham	Archive	Brian Moffet	09/07/2018 10:34:41	No
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	05/14/2018 13:30:44	No
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	05/14/2018 13:30:44	No
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	05/14/2018 13:30:44	No
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	05/14/2018 13:30:44	No
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	12/14/2018 14:53:39	No

Showing 1 to 15 of 501 entries

Show15entries

Previous12345...34Next

+ Add Proposal

Clone Proposal

Settings

Edit Layout

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## 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.

### Proposal Settings



Pricing Rules

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Search...

Rule Name		Discount	
<a href="#">Builder Discount</a>		-10%	
<a href="#">Builder Discount</a>		2%	
<a href="#">Customer Discount</a>		-5%	
<a href="#">Designer Discount</a>		-10%	
<a href="#">Preferred Customer</a>		-15%	
<a href="#">Project Management</a>		10%	

## Locations

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

### Proposal Settings



Pricing Rules

Locations

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Contracts

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Search...

Location	Abbreviation	Description
Board Room	BR	Empty
Conference Room	CR	Empty
Covered Patio	CP	Empty
Dining Room	DR	Empty
Equipment Closet	EC	Empty
Family Room	FR	Empty
Great Room	GR	Empty



## Systems

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

## Proposal Settings

[Pricing Rules](#)[Locations](#)[Systems](#)[Payment Schedules](#)[Contracts](#)[Scope of Work](#)

System Name	Abbreviation	Description	
<a href="#">Audio/Video</a>	<a href="#">AV</a>	<a href="#">Audio/Video Distribution</a>	
<a href="#">Control System</a>	<a href="#">CS</a>	<a href="#">Control System</a>	
<a href="#">Lighting Control</a>	<a href="#">LC</a>	<a href="#">Lighting Control</a>	
<a href="#">Security System</a>	<a href="#">SEC</a>	<a href="#">Security System</a>	
<a href="#">Small Conference Room</a>	<a href="#">SC</a>	<a href="#">Small Conference Rooms</a>	
<a href="#">Structure Wire</a>	<a href="#">SW</a>	<a href="#">Structure Wiring</a>	
<a href="#">Televisions</a>	<a href="#">TV</a>	<a href="#">Televisions</a>	

## 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.

### Proposal Settings



Pricing Rules   Locations   Systems   **Payment Schedules**   Contracts   Scope of Work

Search...

Schedule Name	Options	
<a href="#">Basic Payment Schedule</a>	50% Due Upon Deposit on System = 50% 40% Due Upon Equipment Delivery = 40% 10% Due Upon Completion = 10%	
<a href="#">New Construction Payment Schedule</a>	Deposit on System = 5% Due upon completion of prewire = 15% Due upon completion of trim = 20% 60 days before install = 50% Due completion = 10%	
<a href="#">Small Project</a>	Due upon acceptance = 50% Due upon completion = 50%	
<a href="#">Large Commercial Project</a>	50% Due upon Receipt = 50% 40% Due upon equipment delivery = 40% 10% Due upon substantial completion = 10%	
<a href="#">50/50 Payment Schedule</a>	50% Due upon acceptance = 50% 50% Due upon completion = 50%	

#### Edit Payment Options



Terms

50% Due Upon Deposit on System	50	
40% Due Upon Equipment Delivery	40	
10% Due Upon Completion	10	

+



## 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.

## Proposal Settings

[Pricing Rules](#)[Locations](#)[Systems](#)[Payment Schedules](#)[Contracts](#)[Scope of Work](#)

Contract Name	Contract Text	
Contract 1	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla turpis massa, lacinia sit amet felis quis, fermentum luctus eros. Nunc euismod enim risus, eget tempus metus consequat et. Morbi placerat lorem quis tincidunt ornare. Praesent sem mi, dignissim eu lorem quis, tincidunt consectetur lacus. [CLICK FOR MORE]	
Contract 2	This contract ids between ProjX360 and {{client_name}} [CLICK FOR MORE]	
New Contract	[CLICK FOR MORE]	

## 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.

## Proposal Settings

[Pricing Rules](#)[Locations](#)[Systems](#)[Payment Schedules](#)[Contracts](#)[Scope of Work](#)

Scope Name	Scope Text	
Basic Scope of Work	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla turpis massa, lacinia sit amet felis quis, fermentum luctus eros. Nunc euismod enim risus, eget tempus metus consequat et. Morbi placerat lorem quis tincidunt ornare. Praesent sem mi, dignissim eu lorem quis, tincidunt consectetur lacus. [CLICK FOR MORE]	
New Scope of Work	[CLICK FOR MORE]	
X_Sample_SOW	INTERIOR Throughout • Patch all walls and trim in preparation for paint. Paint entire interior per our discussion • Fix/replace outlets/covers as necessary (ensure matching colors and styles) • Fix/replace switches/switch-plate covers as necessary (ensure matching colors and styles) • Clean [CLICK FOR MORE]	

## 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.

**Project Categories**

Show 15 entries

Category Name	
Bedbrock Deveopment	Applied To 24 Projects
Crestron(mc3), pent-air, interlogix-monitored, trane	Applied To 1 Project
Eagle Custom Homes	Applied To 26 Projects
Home Owner	Applied To 8 Projects
JM Wall Development	Applied To 15 Projects
Schultz Development	Applied To 16 Projects
Service	Applied To 28 Projects
University Test	Applied To 0 Projects

Showing 1 to 8 of 8 entries

Previous 1 Next

+ Add New Category

## 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.

Sort	Checklist Name	Number of Items	Attached to
	Job Progress	64 Items	Attached to 56 projects
	Prewire	15 Items	Attached to 94 projects
	Trim	15 Items	Attached to 103 projects
	Final	18 Items	Attached to 104 projects
	Test 1.24.19	3 Items	Attached to 6 projects
	JIP Small	2 Items	Attached to 5 projects
	Fusion Demo	2 Items	Attached to 3 projects
	QC Checklist	4 Items	Attached to 4 projects
	Pre-final	7 Items	Attached to 7 projects
	Programming	0 Items	Attached to 4 projects

Showing 1 to 10 of 10 entries

Sort	Item
	Initial Consultation
	Collect house plans (electronic)
	Collect/complete Client Information
	Create proposal & payment schedule
	Signed Proposal
	Create accounting file
	Create invoice for deposit
	Upload proposal to ProjX360
	Set up project on ProjX360
	Design Meeting: forecast scheduling, update JIP

Showing 1 to 10 of 64 entries

## 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.

Custom Forms

Show 15 entries

Search:

Sort	Existing Custom Forms	Number of Form Elements	Layout Style
	Processor	1	Block
	Motorized Shades	4	Block
	Add and Delete	3	Table
	Consumables	4	Block
	Network Switches	8	Block
	Demo	5	Table
	Security Zone List Test	3	Table
	Motorized Shades Test	4	Block
	System Design	4	Table
	Motorized Shade Cable Testing	3	Block
	Power Devices	4	Table
	Motorized Shades 1.24.19	4	Block

Edit Custom Form

Main Form SubForms

Add and Delete

Show 10 entries

Search:

Sort	Field Type	Field Label
	select	Ports
	text	Labels
	select	Patch Panel

Showing 1 to 3 of 3 entries

Previous 1 Next

## 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.

**Project Setup templates**

Name	Description	Trades	Checklists	Forms	Custom Forms	Phases
<a href="#">Commercial Project</a>	<a href="#">Commercial Project</a>	<a href="#">Manage Trades</a>	<a href="#">Manage Checklists</a>	<a href="#">Manage Forms</a>	<a href="#">Manage Custom Forms</a>	<a href="#">Manage Phases</a>
<a href="#">Large Project</a>	<a href="#">Large Project</a>	<a href="#">Manage Trades</a>	<a href="#">Manage Checklists</a>	<a href="#">Manage Forms</a>	<a href="#">Manage Custom Forms</a>	<a href="#">Manage Phases</a>
<a href="#">Mid Size Project</a>	<a href="#">Mid Size Project</a>	<a href="#">Manage Trades</a>	<a href="#">Manage Checklists</a>	<a href="#">Manage Forms</a>	<a href="#">Manage Custom Forms</a>	<a href="#">Manage Phases</a>
<a href="#">Small Project</a>	<a href="#">Small Project</a>	<a href="#">Manage Trades</a>	<a href="#">Manage Checklists</a>	<a href="#">Manage Forms</a>	<a href="#">Manage Custom Forms</a>	<a href="#">Manage Phases</a>

Showing 1 to 4 of 4 entries

Show 15 entries

Previous 1 Next

## 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.

Title	Project	Type	Status	Age	Added	Updated	Client	Billable	Description	Actual
Allen - Family Room TV Issue	Allen Crestron System	Service	Not Scheduled	568 days	07/27/2017 11:52:33 AM	01/28/2019 6:38:03 AM	Brian Allen	Billable	Empty	900.37%
Allen - Family Room TV Service Call	Allen Crestron Home Automation System Designer Engineer	Service	Not Scheduled	519 days	09/14/2017 2:21:11 PM	12/17/2018 11:46:09 AM	Brian Allen	Billable	Empty	0.00%
Allen - Final WO	Allen Crestron System	Project	Scheduled	388 days	01/23/2018 8:20:53 AM	04/25/2018 1:06:07 PM	Brian Allen	Not Billable	Empty	0.29%
Allen - Prewire and Trim Work	Allen Crestron System	Project	Scheduled	592 days	07/03/2017 7:25:09 AM	09/27/2017 6:23:31 AM	Brian Allen	Billable	Empty	2.25%
Allen - Prewire Control 4	Allen Control 4 System	Project	In Progress	562 days	08/02/2017 9:21:12 AM	05/03/2018 6:32:03 AM	Brian Allen	Not Billable	Empty	1.00%
Allen - Prewire WO	Allen Crestron Home Automation System Designer Engineer	Project	Scheduled	456 days	11/16/2017 10:15:49 AM	12/11/2017 12:53:48 PM	Brian Allen	Not Billable	Empty	0.00%

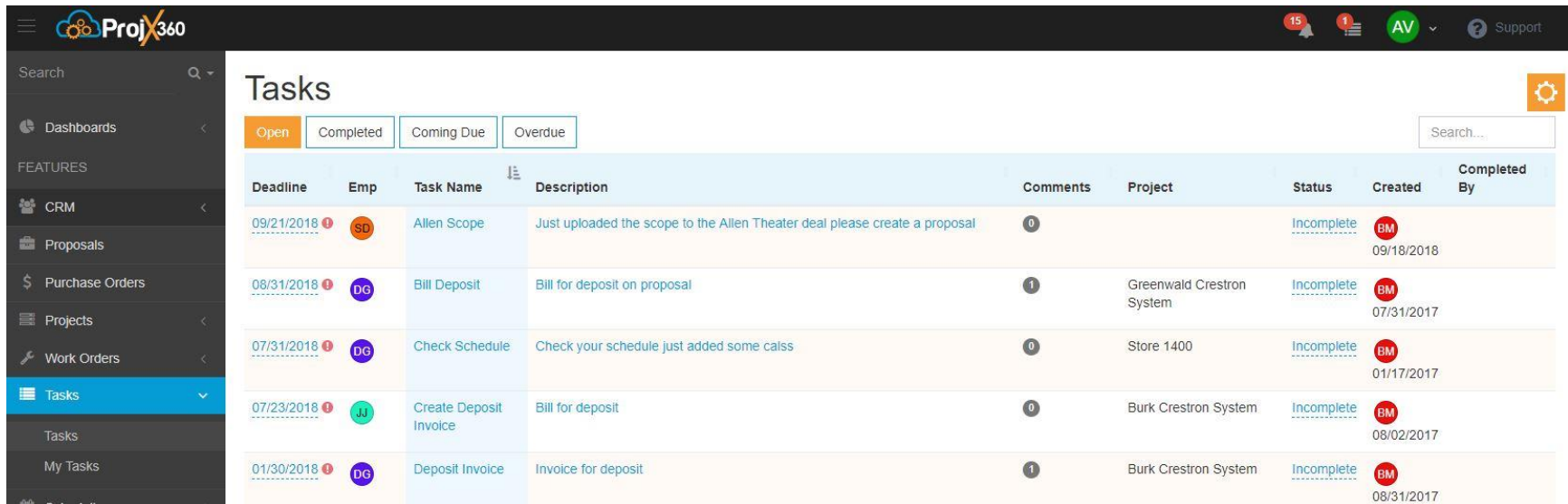
## Tips

- 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.



Deadline	Emp	Task Name	Description	Comments	Project	Status	Created	Completed By
09/21/2018	SD	Allen Scope	Just uploaded the scope to the Allen Theater deal please create a proposal	0		Incomplete	09/18/2018	BM
08/31/2018	DG	Bill Deposit	Bill for deposit on proposal	1	Greenwald Crestron System	Incomplete	07/31/2017	BM
07/31/2018	DG	Check Schedule	Check your schedule just added some calss	0	Store 1400	Incomplete	01/17/2017	BM
07/23/2018	JJ	Create Deposit Invoice	Bill for deposit	0	Burk Crestron System	Incomplete	08/02/2017	BM
01/30/2018	DG	Deposit Invoice	Invoice for deposit	1	Burk Crestron System	Incomplete	08/31/2017	BM

## 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).

The screenshot displays the Proj360 Scheduling interface. The top navigation bar includes the Proj360 logo, a search bar, and user profile information (AV). The left sidebar lists various features: Dashboards, CRM, Proposals, Purchase Orders, Projects, Work Orders, Tasks, Scheduling (selected), Schedule, Project Gantt View, My Schedule, Time Tracking, Service, Invoices, Document Library, Products, Reporting, Integrations, and Settings.

The main content area is titled "Master Schedule". Above the calendar grid, there is a row of five icons: a calendar, a key, a list, a person, and a group of people. These icons are outlined in red, indicating they are used to adjust which calendar displays. Below the icons, the "Filter By:" section shows "Employees" with a list of employee initials (AV, BM, DG, JJ, SD, SC) and "Unscheduled Service WO" with a list of work orders.

The calendar grid shows the month of February 2019. The grid is organized by days of the week (MON, TUE, WED, THU, FRI) and dates. Each date cell contains a list of scheduled events, represented by colored blocks with employee initials and event descriptions. For example, on February 1st, there is a 9:00a event for Smith, Doug - Final Work Order | Training 2.5.19. On February 2nd, there is a 9:00a event for Greenwald - Family Room Tv Issue.

- 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.

Search

Dashboards

FEATURES

CRM

Proposals

Purchase Orders

Projects

Work Orders

Tasks

Scheduling

Schedule

Project Gantt View

My Schedule

Time Tracking

Service

Invoices

Document Library

Products

Reporting

Integrations

Work Order Schedule

Filter By:

Unscheduled Service WO

Allen - Family Room TV Issue

Allen - Family Room TV Service Call

Smith, John - Family Room TV Not Powering

Burk - Install TV in Family Room

Allen - Service Test 2.13.18

Greenwald - TV Service 3.8.18

Smith, Jason - Camera not working 7.23.18

Greenwald - Test 10.9.18

Revolution Systems - CCTV Camera Issue

Greenwald - Apple TV 11.16.18

Davis, Brian - Family Room TV Issue 1.4.19

WO #141

Today

< February 2019 >

Month Week Day List

MON	TUE	WED	THU	FRI
28	29	30	31	1
4	5	6	7	8
11	12	13	14	15
	9:30a BM DG SG Greenwald, Doug - Family Room TV Issue 1.29.19	8:30a BM DG SG WO #120	12:00a AV DG SG Allen - Family Room TV Issue 8:30a BM DG SG WO #140	9:00a BM DG SG Greenwald - Family Room Tv Issue 2:00p BM DG SG Service audio 3:00p BM DG SG WO #139
18	19	20	21	22
25	26	27	28	1

## 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

The screenshot displays the ProjX360 interface with the 'Edit Project' modal open. The modal includes a 'Project Color' selector, an 'Associated Employees' button, and a 'Select Template' dropdown. Below these, the 'Select Time Tracking' section features a 'Choose Time Tracking Phase...' dropdown and a 'Budget Hours' input field with a checkmark. A table lists time tracking phases and their corresponding budget status.

Time Tracking Phase	Budget
Final	Empty
Prewire	Empty
Programming	Empty
Lighting Programming	Empty
Engineering	Empty
Project Management	Empty
Trim	Empty

### 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://pjax.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.

The screenshot shows the ProjX360 web application interface. The top navigation bar includes the ProjX360 logo, a search bar, and user profile information (AV). The left sidebar contains a menu with options: Search, Dashboards, FEATURES, CRM, Proposals, Purchase Orders, and Projects (selected). The main content area is titled 'Projects' and displays a table of projects. The table has columns for Status, Project Name, Client Name, Category Name, Phone, Email, PM, Phase, Designer, Address, and City. The 'Status' column has filters for 'In Warranty' and 'Out of Warranty'. The table lists five projects, all with 'In Warranty' status. The bottom of the table indicates 'Showing 1 to 5 of 5 entries'.

Status	Project Name	Client Name	Category Name	Phone	Email	PM	Phase	Designer	Address	City
In Warranty	Smith Home Theater	John Smith	Home Owner			SD	Trim	DG	15955 N. Dial Blvd. #5	Scottsdale
In Warranty	Krenz Crestron System	Rod Krenz	JM Wall Development			SD		DG	2345 E. 124th St.	Phoenix
In Warranty	Greenwald Test 2.15.18	Doug Greenwaldo	Service	(480) 998-9699	Doug@ptsmultimedia.com	SD		SD	15955 N. Dial Blvd. #4	Scottsdale
In Warranty	Davis, Brian - Service	Brian Davis	Service			SD		DG	15955 N Dial Blvd	Scottsdale
In Warranty	Jones Service	Jason Jones2	Bedbrock Deveopment			DG		DG	18471 E. Peartree Ln.	Queen Creek

## 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

**Invoice** Workorder WorkOrder 18

**ProjX360**  
15995 N. Dial Blvd. Ste 5  
Scottsdale AZ, 85260  
(480) 555-1212  
support@projx360.com

Invoice Number: PJX 0000018  
Date Created: 02/28/2017

☐ Sent  
☒ Paid

**PAID**

QTY	Description	Unit	EXT	Tax
2.0000	Labor		\$100.00	\$200.00 Labor Not Taxable
1.0000	Crestron C2N-IO		\$300.00	\$300.00 Item Taxable

Description: Test

## 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.

**Product Manager**

Brand	Model Number	Item Name	MSRP	Cost	Category	Supplier	Short Description
Absolute ACOUSTICS	NDS-872HD-RX	Absolute ACOUSTICS NDS-872HD-RX	\$340.00	\$124.00	Contacts & Sensors	Allnet Distributing	Class A HDMI over HDBaseT receiver capable distance up to 328feet (100m) over a single CAT
Absolute ACOUSTICS	NDS-572HD-RX	Absolute ACOUSTICS NDS-572HD-RX	\$260.00	\$195.00	Transmission Systems		Class B HDMI over HDBaseT receiver capable distance up to 230feet (70m) over a single CAT
Absolute ACOUSTICS	NDS-871HD-TX	Absolute ACOUSTICS NDS-871HD-TX	\$360.00	\$270.00	Transmission Systems		Class A HDMI over HDBaseT transmitter capab distance up to 328feet (100m) over a single CAT
Absolute ACOUSTICS	NDS-UHM44	Absolute ACOUSTICS NDS-UHM44	\$2,390.00	\$1,792.50	Switchers		HDMI/HDBaseT matrix switcher with 4 input and 4 output capable of transmitting audio and video, control signal and electrical power supply for distance up to 328 feet (100m) over a single CAT cable
ADS	Final Installation	ADS Final Installation	\$0.00	\$0.00	Accessories		Final Install Labor
Altronix	SAV182D	AltronixSAV182D	\$256.50	\$150.00	Uncategorized Electrical Supplies		18OUT 12VDC@11A PTC CCTV P/S
APC	C2	APC C2	\$99.99	\$60.99	INFRASTRUCTURE		C Type, 2-outlet wall mount power filter, 120V / 12A.
APC	G50NETB2	APC G50NETB2	\$399.90	\$320.99	INFRASTRUCTURE		G Type rack power filter, AV network manageable, 4 controlled outlets (3 Banks), 120V / 15A, rack mount (1U), black.
Apple	MQD22LL/A	Apple MQD22LL/A	\$179.99	\$0.00	General Uncategorized	Avad	Apple 4K TV 32Gb

**Product Manager Actions:**

- + Add Product
- Search Portal
- Mass Edit Products
- Select All Visible
- Clear Selection
- Settings
- Edit Layout

## 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 1<sup>st</sup> 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.

15
1
AV
Support

Search

Dashboards

FEATURES

CRM

Proposals

Purchase Orders

Projects

Work Orders

Tasks

Scheduling

Time Tracking

Service

Invoices

Document Library

Products

Product Manager

Package Builder

## Product Manager Settings

ProjX360 Suppliers

Refresh Configuration

Category Management

Search...

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	6879706-09	net 20	dave@projx360.com	6023458756
Anixter Inc.	68797049282	net 30	greg@projx360.com	8009872345
Ationa	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
Bav Distributing	89587564832	net 15	clark@projx360.com	8665471209