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## Projects

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## Starting Tips

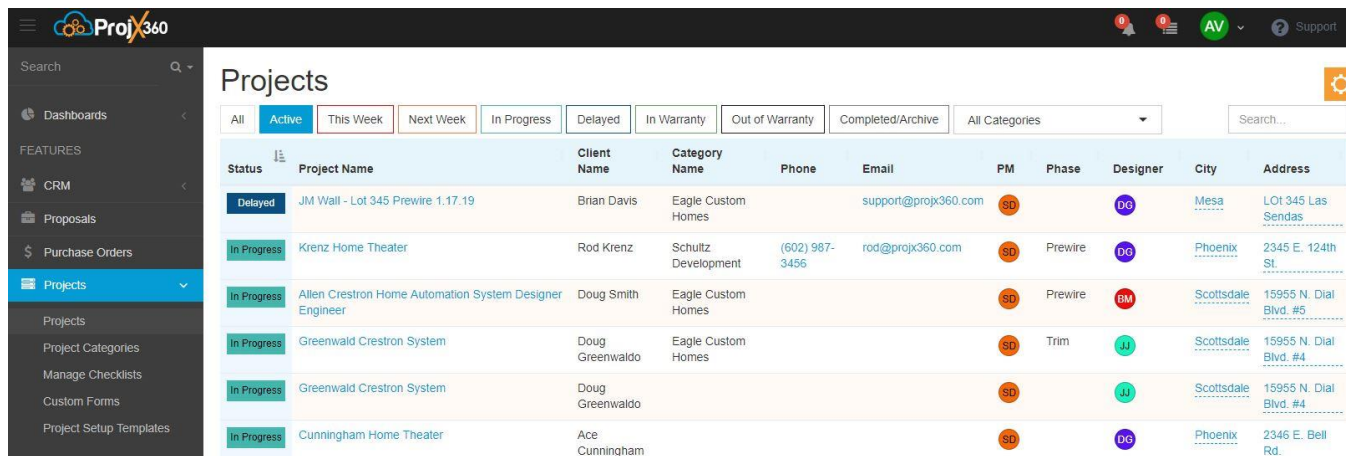
- Projects and any area that do not offer a delete option means you can't delete it. We recommend if you want to create test items do so in our free sandbox area. <https://projx360.com/demo>. Your only option if you have created extra data is to use it for the next record you are adding.
- Recommended 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.
- 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.
- 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>

## Projects

Project management is a vital part of running an efficient and effective company. ProjX360 project management software is designed specifically for the Custom Integration Industry and includes the forms and checklists an integrator needs to complete a project effectively. Each project has a single page overview so at a glance you can see the client's information, assigned tasks, discussions, checklists, time tracking, attached documents, and much more.

Get visibility of every project and the stage of the project with the quick snap shot in the project details page. With this details page you can easily see if an important task or step in the projects procedure was missed or what still needs to be completed for the project to finish or move to the next phase.

- **Project Statuses:** Adjust project status if needed under Settings - Configuration. 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.



Status	Project Name	Client Name	Category Name	Phone	Email	PM	Phase	Designer	City	Address
Delayed	JM Wall - Lot 345 Prewire 1.17.19	Brian Davis	Eagle Custom Homes		support@projx360.com	SD		DG	Mesa	Lot 345 Las Sendas
In Progress	Krenz Home Theater	Rod Krenz	Schultz Development	(602) 987-3456	rod@projx360.com	SD	Prewire	DG	Phoenix	2345 E. 124th St.
In Progress	Allen Crestron Home Automation System Designer Engineer	Doug Smith	Eagle Custom Homes			SD	Prewire	BM	Scottsdale	15955 N. Dial Blvd. #5
In Progress	Greenwald Crestron System	Doug Greenwald	Eagle Custom Homes			SD	Trim	JJ	Scottsdale	15955 N. Dial Blvd. #4
In Progress	Greenwald Crestron System	Doug Greenwald				SD		JJ	Scottsdale	15955 N. Dial Blvd. #4
In Progress	Cunningham Home Theater	Ace Cunningham				SD		DG	Phoenix	2346 E. Bell Rd.

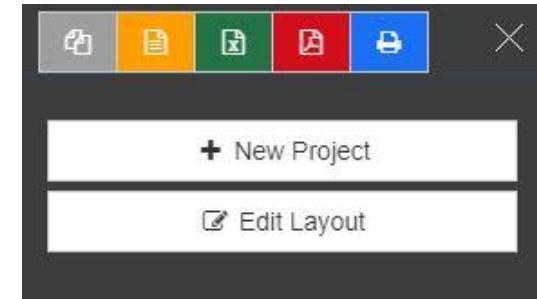
## Tips

- Click on column headers to sort data.
- Utilize the "Search..." feature to narrow results.
- You can toggle between Project statuses by clicking between the tabs.
- Show "15" entries will display along the bottom of the Project dashboard. If you need to show more results change this and it will save your page setting.
- Filter by a category you created to narrow your results.

## Projects Page

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 Project:** Creates new project. Other ways to create a Project is within the “View Deal” page if you have a Sales CRM License. In your Proposal click the “Create Project” button and in a “View Person” record expand Associated Record click the “Create Project” button.
- **Edit Layout:** This is where you can drag and drop the order in which your project column information displays. Toggle the eye icon to show/hide columns if there are certain columns you do not want to display.



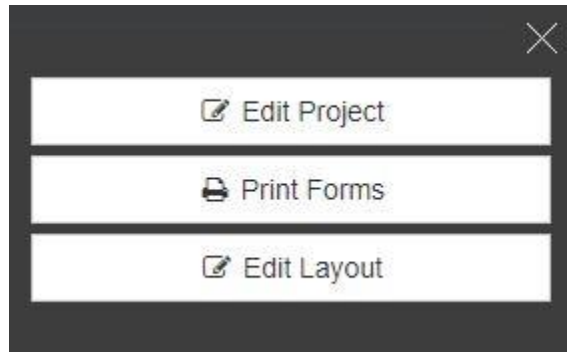
New Project ×

<input type="text" value="Project Name(Required)"/>		<input type="text" value="Choose Client (Required)"/>
<input type="text" value="Project Address"/>		<input type="text" value="City"/>
<input type="text" value="State"/>	<input type="text" value="Post Code"/>	<input type="text" value="Country"/>
<input type="text" value="Choose Designer (Required)"/>		<input type="text" value="Choose Project Manager (Required)"/>
<input type="text" value="Contact"/>		<input type="text" value="Project Email"/>
<input type="text" value="Project Phone"/>		<input type="text" value="Gate Code"/>
<input type="text" value="Choose Status"/>		<input type="text" value="Choose Project Category..."/>
<input type="text" value="Choose Installer(s)..."/>		<input type="text" value="Choose Programmer(s)..."/>

[Less...](#)

## Project Details Page

Click the orange cogwheel for menu options.



- **Edit Project:** Allows you to add project colors, edit associated employees, apply from project template, select time tracking, trades, checklists, custom forms, pre populated forms.
- **Print Forms:** Print your forms from here. Toggle page breaks or turn off which forms are not displayed.
- **Edit Layout:** This is where you can drag and drop the order in which your project overview boxes display. Toggle the eye icon to show/hide sections if there are certain sections you do not want to display.

**ProjX360**

**Krenz Home Theater**

**0 TASKS** **0 DISCUSSIONS**

**PROJECT INFORMATION**

**In Progress**

**Phase:** Schutz Development

**Project Category:** Schutz Development

**Address:** 2345 E. 124TH ST, PEORIA, IL 61655

**Client Name:** Rod Krenz

**Project Contact:** Rod Krenz

**Phone Number:** (807) 967-3456

**Email Address:** rod@projx360.com

**Gate Code:** Empty

**Projected Start Date:** 11/09/2016

**Est Completion:** 04/04/2017

**Warranty Start:** Empty

**Warranty Ends:** Empty

**Design Meeting:** Empty

**Deposit Paid:** Unpaid

**Programming:** Pending

**Equipment In Stock:** Need To Order

**Designer:** [Icon]

**Project Manager:** [Icon]

**Programmer(s):**

**Installer(s):**

**TRADES**

**Prerequisite Pools**

**TIME TRACKING**

**Overall Project | 42,010hrs vs. 66,250hrs budget**

**Final | 27,010hrs vs. 34,000hrs budget**

**Preview | hrs vs. 0,250hrs budget**

**Rough In | 42,000hrs vs. 30,000hrs budget**

**Trim | 8,000hrs vs. 2,000hrs budget**

**WORK ORDERS**

**All Project Service**

**WorkOrder 2 - Created 01/10/2017**  
Creston, Blah, more info Check project

**WorkOrder 8 - Created 01/16/2017**  
Whats wrong

**Krenz Home Theater Install - Created 03/22/2017**  
Creston system not working

**CHECKLISTS**

**Job Progress 0% Complete**

**Preview 0% Complete**

**Trim 0% Complete**

**Final 0% Complete**

**Pre-Sale 0% Complete**

**0 TASKS**

**See All Tasks**

**INVOICES**

**WorkOrder 2 - Created 09/11/2017**

**Progressive Invoices**

**No Associated Invoices For This Project**

**REPAIR TRACKING**

Ship Date	RMA Number	Tracking Number
2016-10-21		✓ Received

**DISCUSSIONS**

**0 DISCUSSIONS**

**See All Discussion**

**DOCUMENTS**

**MAP**

**View larger map**

**NOTES**

**Form Secured General Time Clock**

**Search Notes**

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- **Home Icon:** Project Overview page
- **Calendar Icon:** Project Calendar
- **Document Icon:** To view your custom forms for this project. Pre Populated Forms can't be adjusted. These include Add/Delete, Network, Security, System Design, HVAC, Pool, Surveillance.

The screenshot displays the Proj360 software interface for the 'Krenz Home Theater' project. The top navigation bar includes a search function and user profile information. The sidebar on the left lists various features: Dashboards, CRM, Proposals, Purchase Orders, and Projects (which is currently selected). The main content area is divided into several sections:

- Project Overview:** Shows 0 tasks and 0 discussions.
- PROJECT INFORMATION:** Indicates the project is 'In Progress' and provides options to 'Select Proposal' or view 'PO Status'.
- TIME TRACKING:** Displays budget comparisons and progress bars for different project phases:
  - Overall Project | 42.0100hrs vs. 66.2500hrs budget
  - Final | 22.0100hrs vs. 34.0000hrs budget
  - Prewire | hrs vs. 0.2500hrs budget
  - Rough In | 12.0000hrs vs. 30.0000hrs budget
- WORK ORDERS:** Lists work orders with their creation dates and status:
  - WorkOrder 2 - Created 01/10/2017 (Crestron, Blah, more info Check projector)
  - WorkOrder 8 - Created 01/16/2017 (Whats wrong)
  - Krenz Home Theater Install - Created 03/22/2017 (Crestron system not working)

TIME TRACKING

Overall Project | 42.0100hrs vs. 66.2500hrs budget

Final | 22.0100hrs vs. 34.0000hrs budget

Prewire | hrs vs. 0.2500hrs budget

Rough In | 12.0000hrs vs. 30.0000hrs budget

Trim | 8.0000hrs vs. 2.0000hrs budget

WORK ORDERS

AllProjectService

WorkOrder 2 - Created 01/10/2017  
Creston, Eliah, more info Check projector

WorkOrder 8 - Created 01/16/2017  
Whats wrong

Krenz Home Theater Install - Created 03/22/2017  
Creston system not working

CHECKLISTS

Job Progress 0% Complete

Prewire 0% Complete

Trim 0% Complete

Final 0% Complete

Pre final 0% Complete

0 DISCUSSIONS

See All Discussion

0 TASKS

See All Tasks

DOCUMENTS

INVOICES

WorkOrder 2 - Created: 09/11/2017

Progressive Invoices

No Associated Invoices For This Project.

MAP

View larger map

REPAIR TRACKING

Ship Date

RMA Number

Tracking Number

2016-10-21

Received

NOTES

FormSecuredGeneralTime Clock

Search Notes

**Time Tracking:** Shows Overall Project Hours vs. Budget. Click into Overall Project to pull up the Overall Project Hours vs. Budget or click on each phase to pull up the project phase totals that can be adjusted by clicking the edit pencil icon.

**Work Orders:** Shows “All”, “Project” or “Service” Work Orders by clicking between tabs. Easily add a WO by clicking the “+” icon.

**Checklists:** Checklist completion progress. Click each checklist to expand checklist items and view status.

**Discussions:** Click “+” to create a project discussion between one or more employees.

**Tasks:** Assign individual task to an employee. A Project is not required.

**Documents:** Click on the manage folders icon. Clicking the cloud icon will allow you to reference an external storage link. Click the “+” icon to add new folders. Click the arrows icon to move files.

Click the “+” symbol to upload attachments.

**Invoices:** Click the “+” icon to create a new invoice. Will show related Invoices and Progressive Invoices.

**Map:** Will show current map view of the selected address specified under project information.

**Repair Tracking:** Click “+” to add a new Repair Ticket. Will also display repair tickets related to the project.

**Notes:** Displays Form, Secured, General and Time Clock Notes. “Secured” Notes will only display if the employee has security settings to access Secure Notes.



## PROJECT INFORMATION

In Progress

Select Proposal ▾

PO Status

Phase: [Prewire](#)

Project Category: [Schultz Development](#)

Address: [2345 E. 124TH ST.  
PHOENIX AZ, 85255](#)  
[EMPTY](#)

Client Name: [Rod Krenz](#)

Project Contact: [Rod Krenz](#)

Phone Number: [\(602\) 987-3456](#)

Email Address: [rod@projx360.com](#)

Gate Code: [Empty](#)

Projected Start Date: [11/28/2016](#)

Est Completion: [04/04/2017](#)

Warranty Start: [Empty](#)

Warranty Ends: [Empty](#)

Design Meeting: [Empty](#)

Deposit Paid: [Unpaid](#)

Programming: [Pending](#)

Equipment In Stock: [Need To Order](#)

Designer: [✉](#) [📞](#) [DG](#)

Project Manager: [✉](#) [📞](#) [SD](#)

Programmer(s):

Installer(s):

**Project Status:** Click on the Status bar to adjust the Project Status.

**Proposal Products | Select Proposal:** Pick List. In order for product to show up here you have to use the “Push Product/Related Products tab within your Proposal. Only 1 Proposal this will show “Proposal Products”. Multiple Proposals will show “Select Proposal”.

**PO Status:** Displays PO Status (Qty, Manuf. Model, Tracking, Status). Draft, Shipped, Backordered, Discontinued, Received are the statuses.

**Phase:** Adjust project phase.

**Project Category:** Pick a Project Category. Can be setup under Projects - Project Categories.

**Address:** Project Address

**Client Name:** Client associated with the Project. Click the edit pencil icon for a shortcut back to the client record.

**Project Contact:** Project Contact Name.

**Phone Number:** Primary Phone Number.

**Email Address:** Project Email.

**Gate Code:** Gate code to access property.

**Project Started Date:** Project Start Date.

**Est Completion:** Project Completion Date.

**Warranty Start:** Warranty Start Date.

**Warranty Ends:** Warranty End Date.

**Design Meeting:** Design Meeting Date.

**Deposit Paid:** Mark Unpaid or Paid.

**Programming:** Mark Pending or Completed.

**Equipment in Stock:**

**Designer, Project Manager, Programmer(s) and Installer(s):** Adjustable by clicking on the orange cogwheel, “Edit Project”. Click the “Associated Employees” button.

## 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.

Use the trash can icon to remove categories.

**Project Categories**

Show 15 entries

Category Name	Applied To	
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

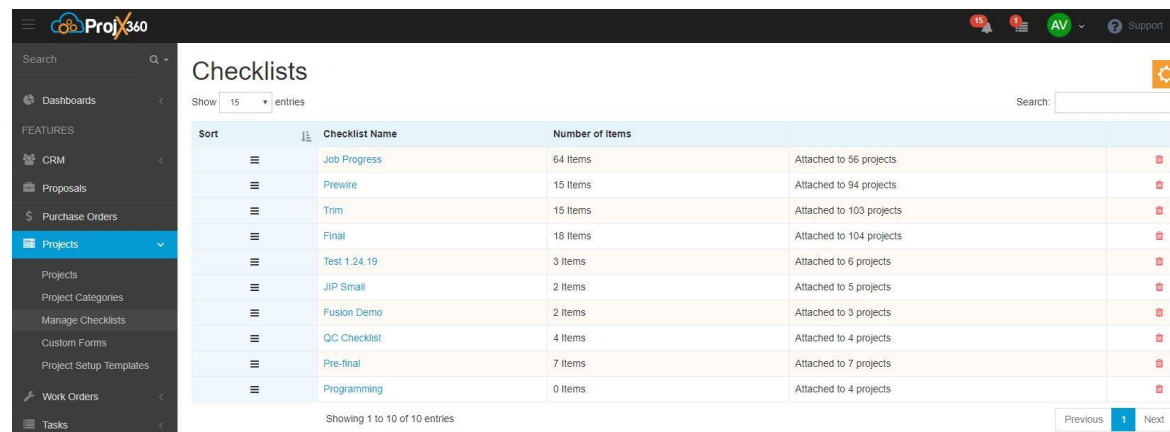
Previous 1 Next

+ Add New Category

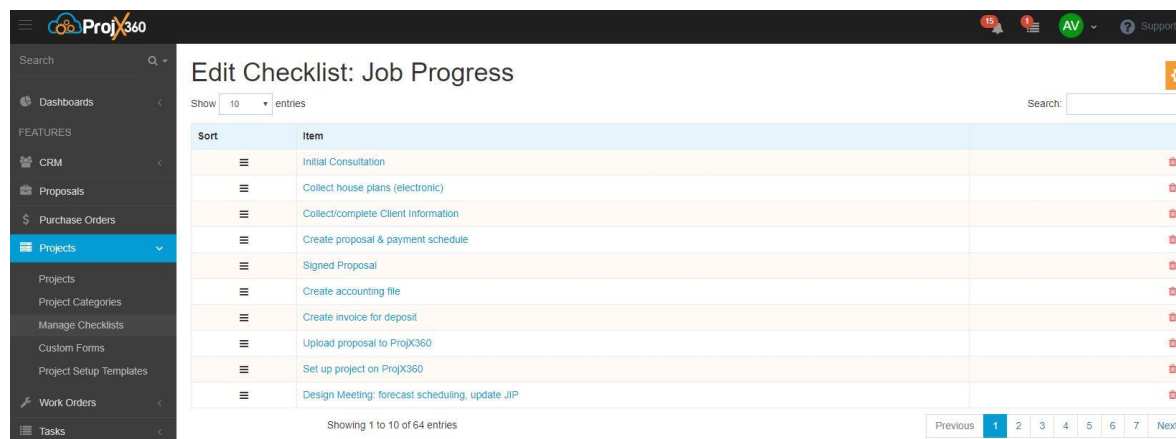
## Manage Checklist

You can create custom checklists of procedures for your installers to install and program a project successfully. As they finish each step in the checklist they can mark them completed. The task will be date stamped and marked with who checked it off. On the project overview page you can see at a glance the percent completed of each checklist to ensure things are progressing as planned.

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	

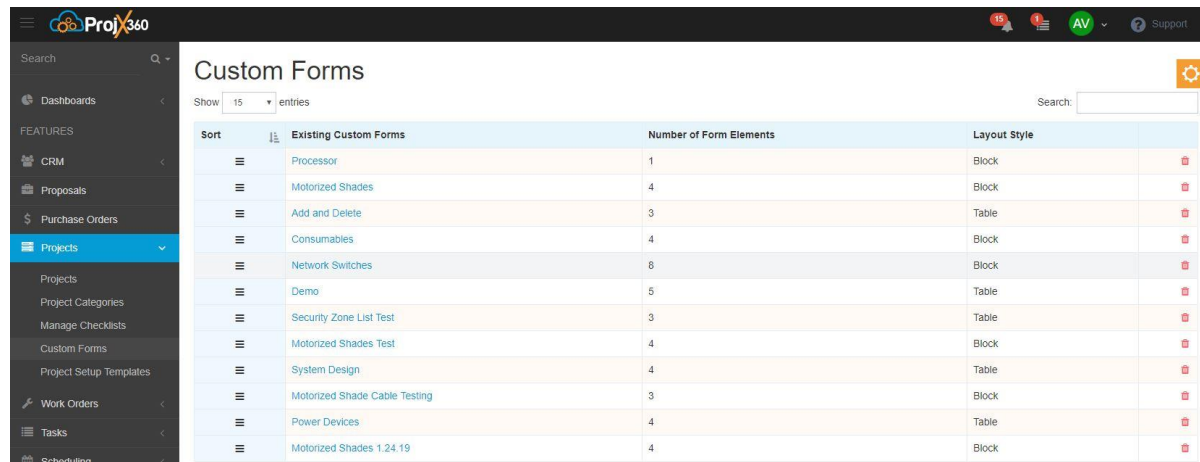


Sort	Item	
	Initial Consultation	
	Collect house plans (electronic)	
	Collect/complete Client Information	
	Create proposal & payment schedule	
	Signed Proposal	
	Create accounting file	
	Create invoice for deposit	
	Upload proposal to ProjX360	
	Set up project on ProjX360	
	Design Meeting: forecast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

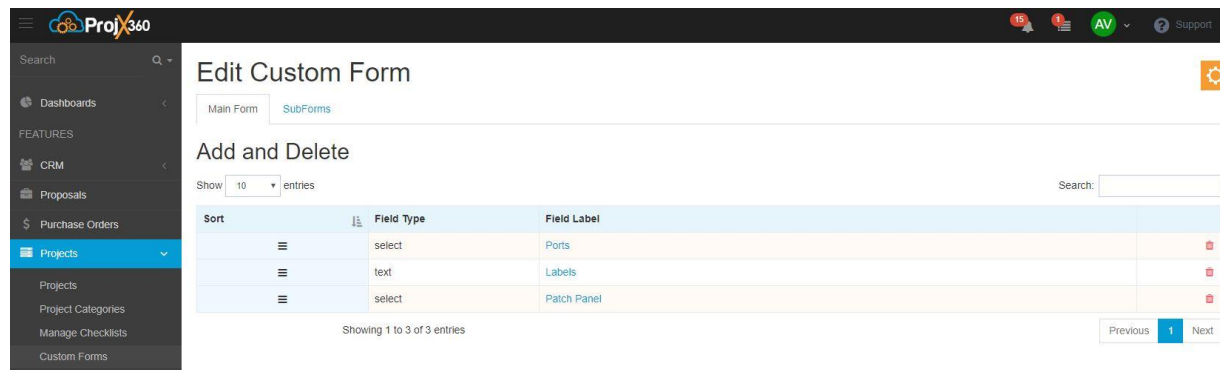
## Custom Forms

The project overview section also houses the project information forms that contain vital information related to that project. These forms consist of the network information, client's services information (i.e. logins for SiriusXM, Pandora, etc.), system design (processor layout, audio zones, video zones, etc.), HVAC info, pool integration info, security zone list, and much more.

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.



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



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

## 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.

Click the orange cogwheel, “+ New Project Setup Template”. A new “UNDEFINED” entry will be added for you to adjust. Fill out the Name, Description and click on Manage Trades, Checklists, Forms, Custom Form, Phases buttons to add which will apply to each template.

The screenshot shows the ProjX360 web application interface. The top navigation bar includes the ProjX360 logo, a search bar, and user profile information (AV) with a support link. The left sidebar lists features: CRM, Proposals, Purchase Orders, and Projects (selected). The main content area is titled "Project Setup templates" and contains a table with 4 entries. Each entry has columns for Name, Description, Trades, Checklists, Forms, Custom Forms, and Phases. The table shows four project templates: Commercial Project, Large Project, Mid Size Project, and Small Project. Each template has a "Manage" button for each category. The bottom of the table shows pagination: "Showing 1 to 4 of 4 entries" and "Previous 1 Next".






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

Previous 1 Next

Example: Click on “Manage Trades” button that will display a blank pop up. Click anywhere in the blank field to display which Trades you have added. If your trades are displaying blank make sure you have added them under Settings – Trades.

## Project Setup templates

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

Show  entries

### Manage Trades

## Tasks & Discussions

Create and assign tasks within a project quickly and easily. 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 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. To improve collaboration among the project team each project has dedicated discussions for more detailed in depth information exchange between employees about the project.

Deadline	Emp	Task Name	Description	Comments	Project	Status	Created	Completed By
01/31/2018	JJ	Schedule Service Call	TV is having issues	2	Doug Smith TV Install	Incomplete	01/12/2017	BM
02/16/2018	SD	Invoice For Deposit	Invoice the deposit per payment schedule	0	Burk 2 Crestron System - 11.15.17	Incomplete	11/15/2017	BM
05/18/2018	DG	Greenwald Proposal	Need proposal created by Friday see Greenwald Deal for details <a href="https://demo.projx360.com/crm/people">https://demo.projx360.com/crm/people</a>	0		Incomplete	05/14/2018	BM
05/31/2018	SD	Start Project	Start project on 5/31/18	0	ABC Company Lot 235 Prewire	Incomplete	05/30/2018	BM
07/12/2018	DG	Test 2	Test system	1	Allen Control 4 System	Incomplete	06/19/2018	BM

To add a new task click the orange cogwheel, “+ Add New Task”.

Leave the “Project” field blank if you do not want to associate to a Project.

Add New Task ×