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Live Chat: https://projx360.com

Projects

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Starting Tips

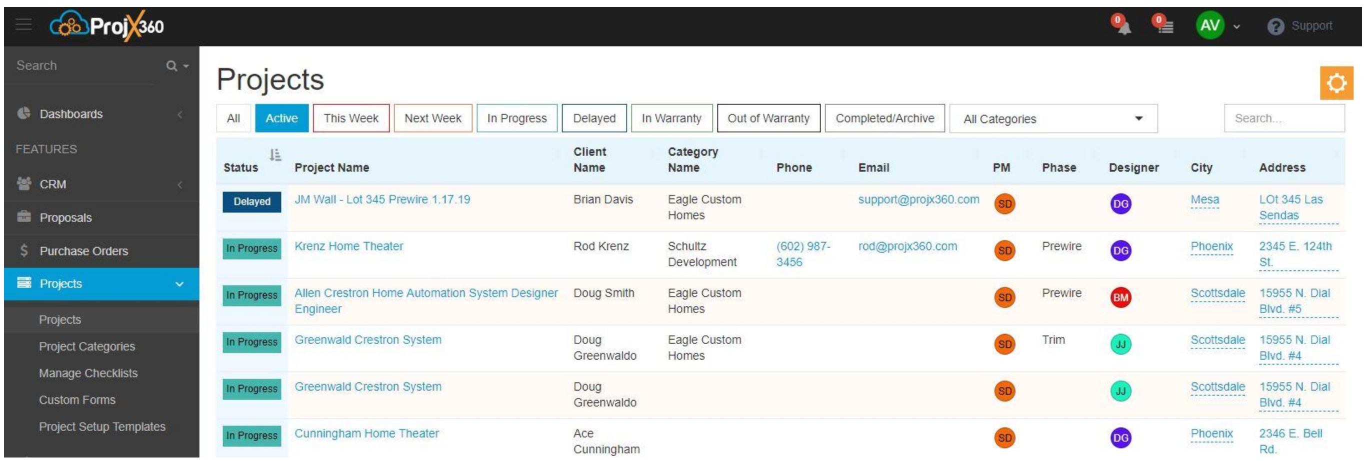
- Projects and any area that do not offer a delete option means you can't delete it. We recommend if you want to create test items do so in our free sandbox area. https://projx360.com/demo. Your only option if you have created extra data is to use it for the next record you are adding.
- Recommended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

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.



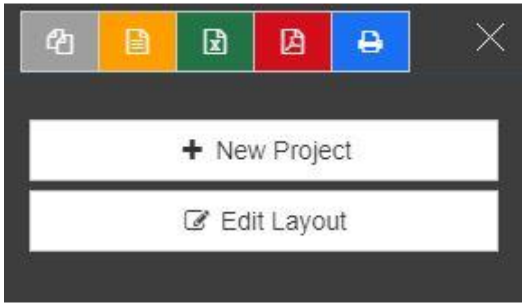
Tips

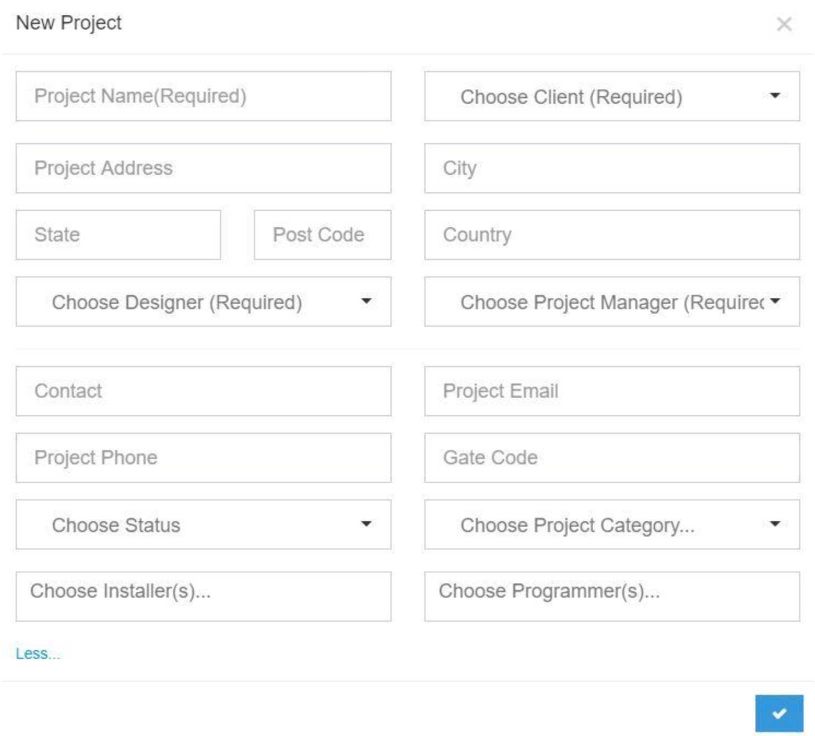
- Click on column headers to sort data.
- Utilize the “Search…” feature to narrow results.
- You can toggle between Project statuses by clicking between the tabs.
- Show “15” entries will display along the bottom of the Project dashboard. If you need to show more results change this and it will save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

Projects Page

Click the orange cogwheel for menu options.

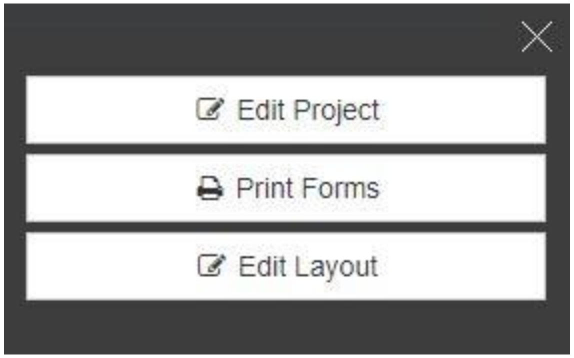
- **Icons**: This gives you the ability to Copy, CSV, Excel, PDF or Print the current data shown.
- **+ New Project:** Creates new project. Other ways to create a Project is within the “View Deal” page if you have a Sales CRM License. In your Proposal click the “Create Project” button and in a “View 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.



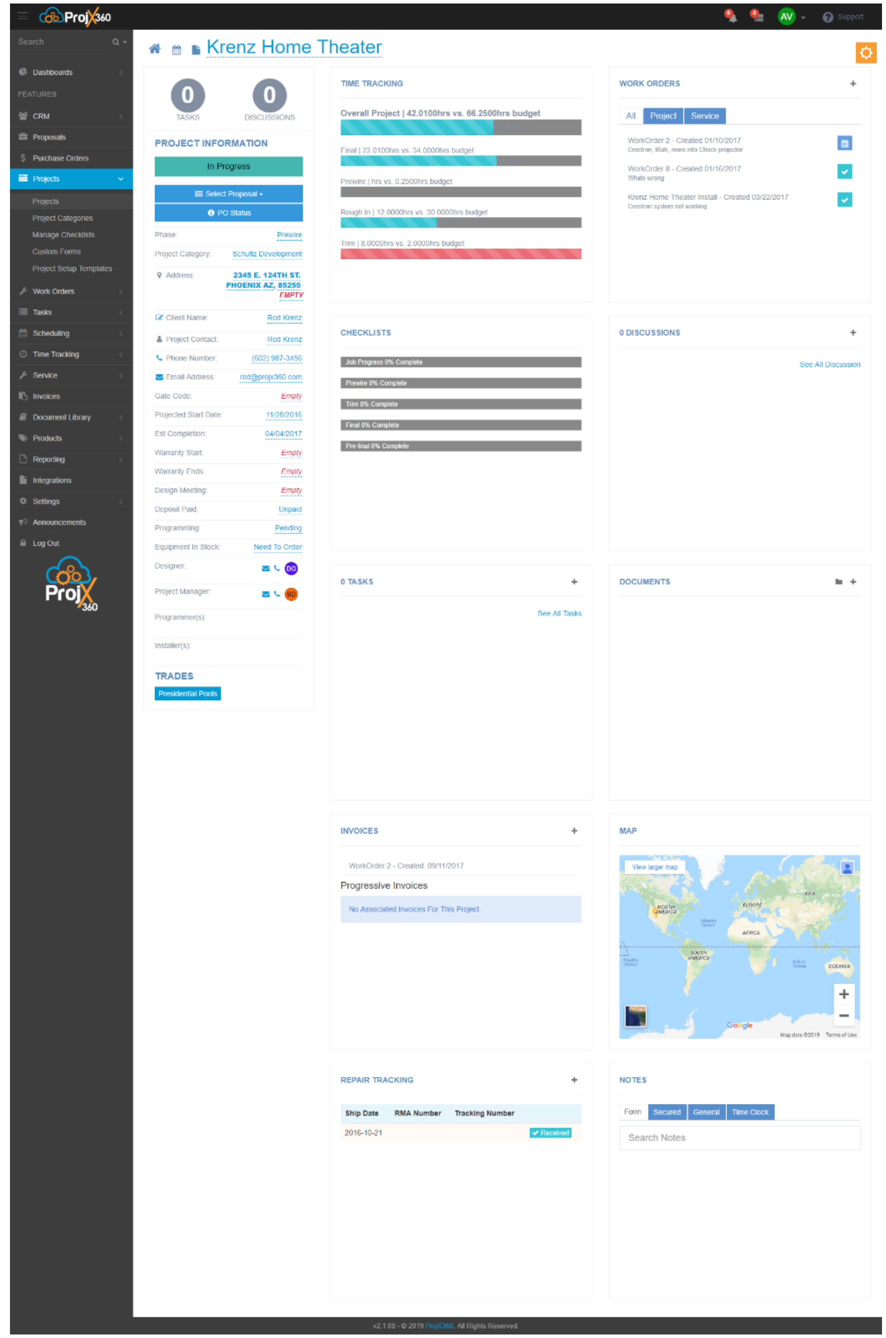


Project Details Page

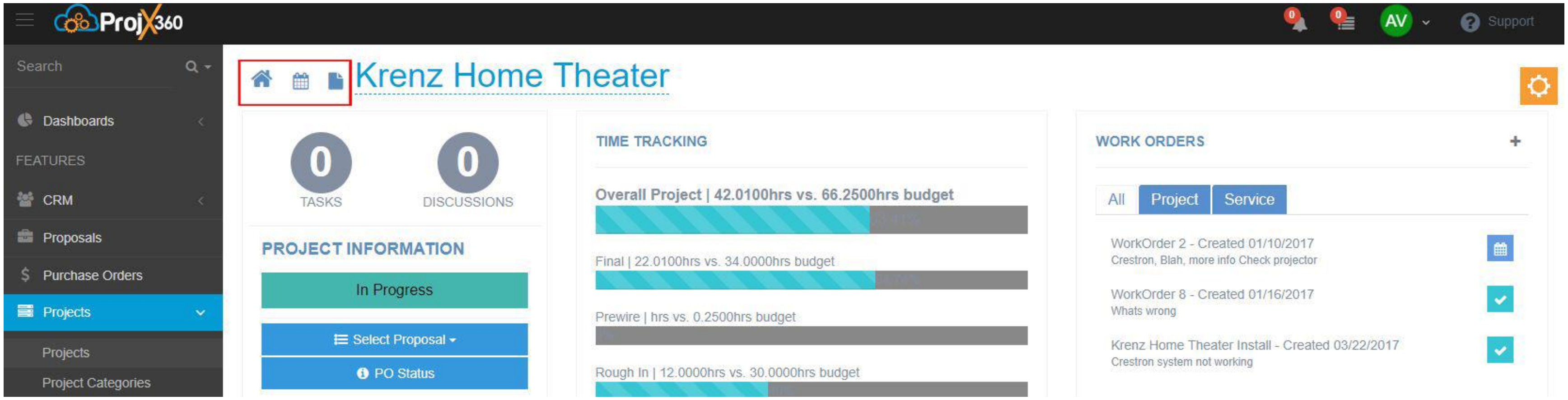
Click the orange cogwheel for menu options.

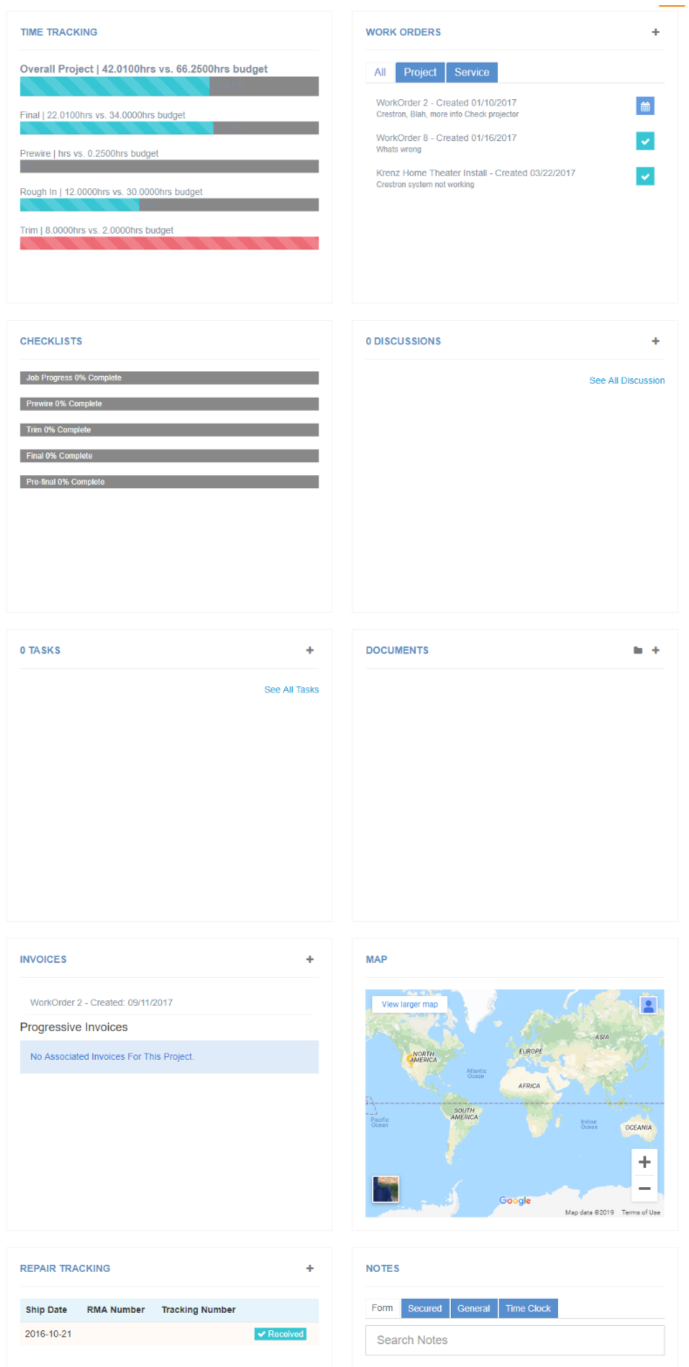


- **Edit Project:** Allows you to add project colors, edit associated employees, apply from project template, select time tracking, trades, checklists, custom forms, pre populated forms.
- **Print Forms**: Print your forms from here. Toggle page breaks or turn off which forms are not displayed.
- **Edit 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.



- **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.





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.

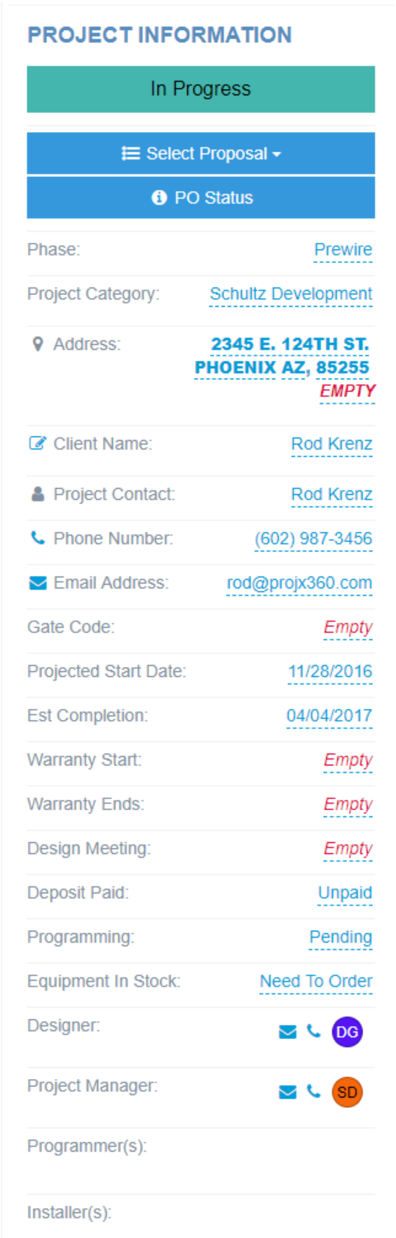
Click the “+” symbol to upload attachments.

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 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.

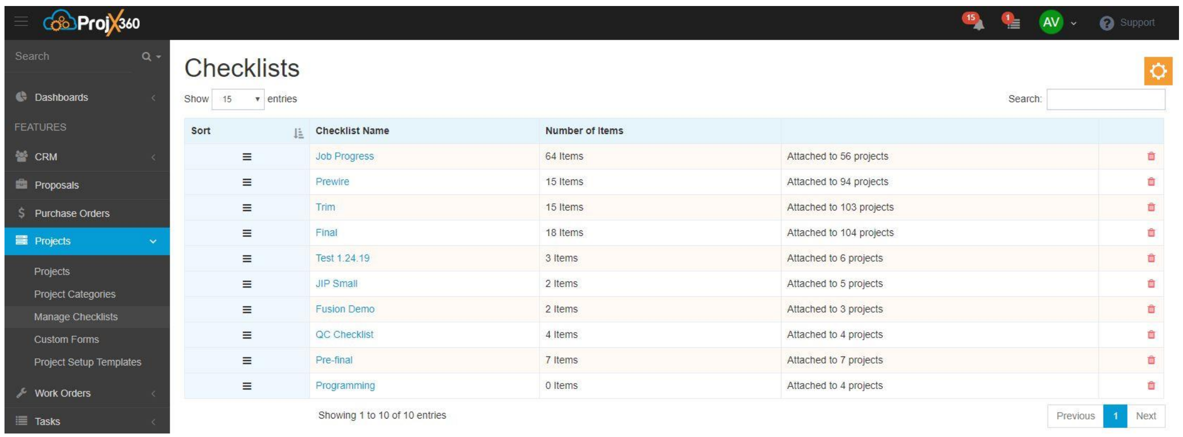
Click the orange cogwheel, “+ New Category” to add a new entry.

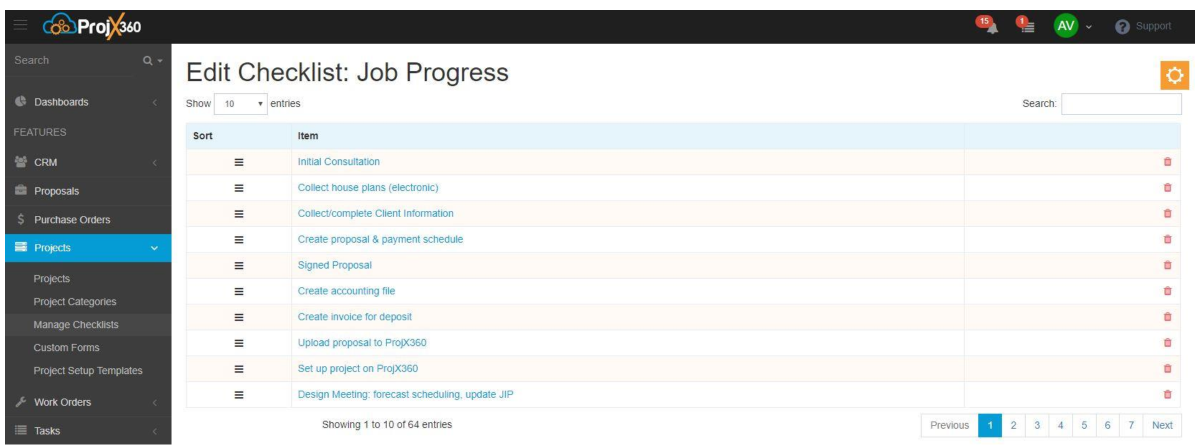
Use the trash can icon to remove categories.

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.

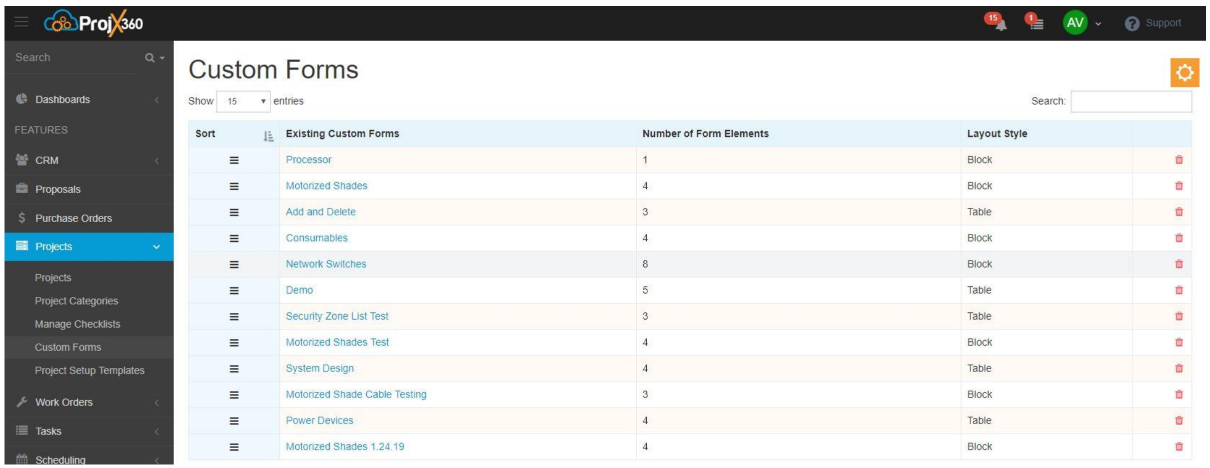


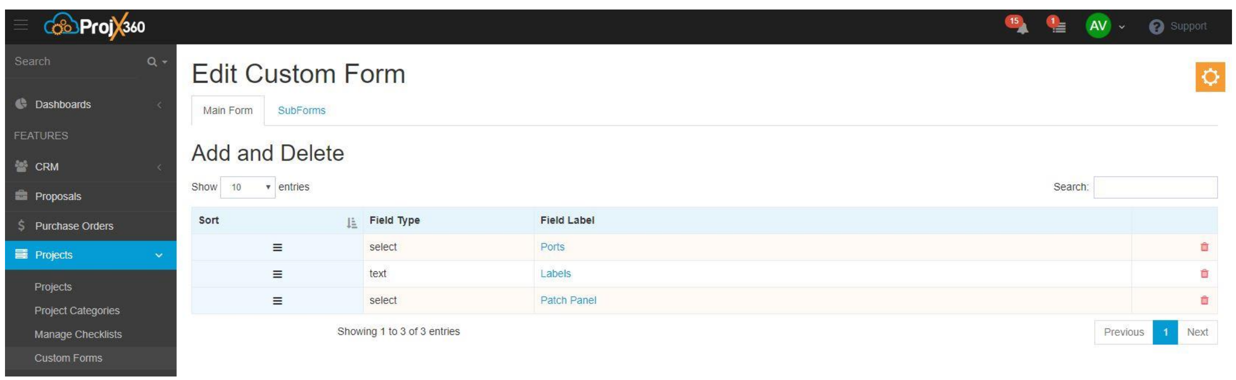


Custom Forms

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.

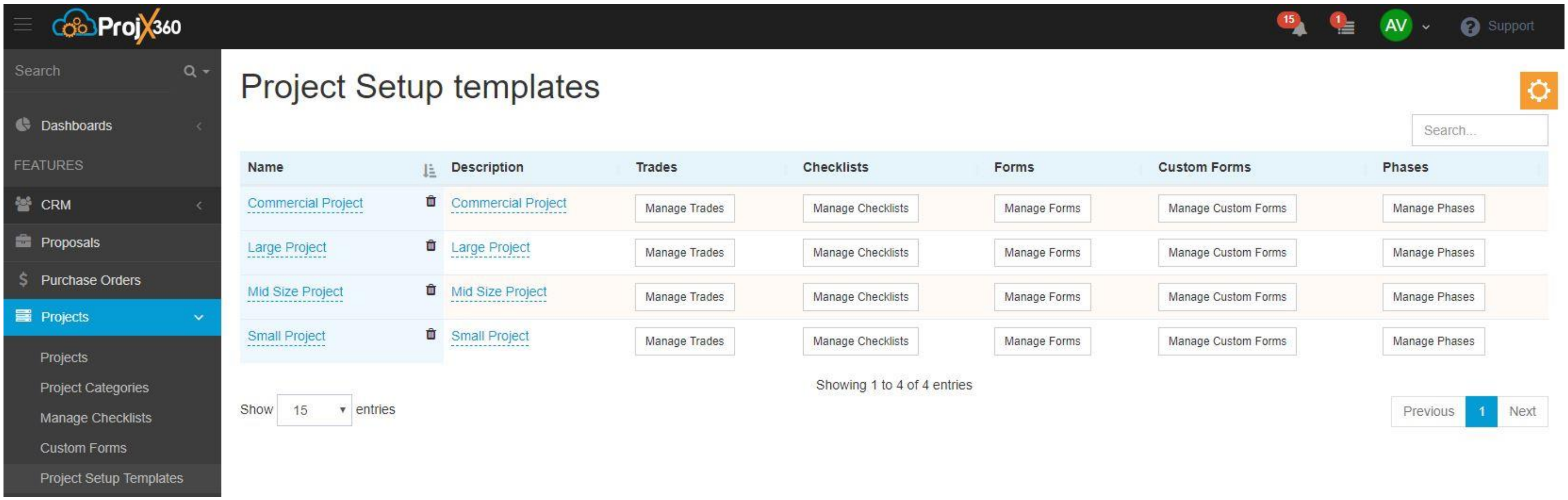




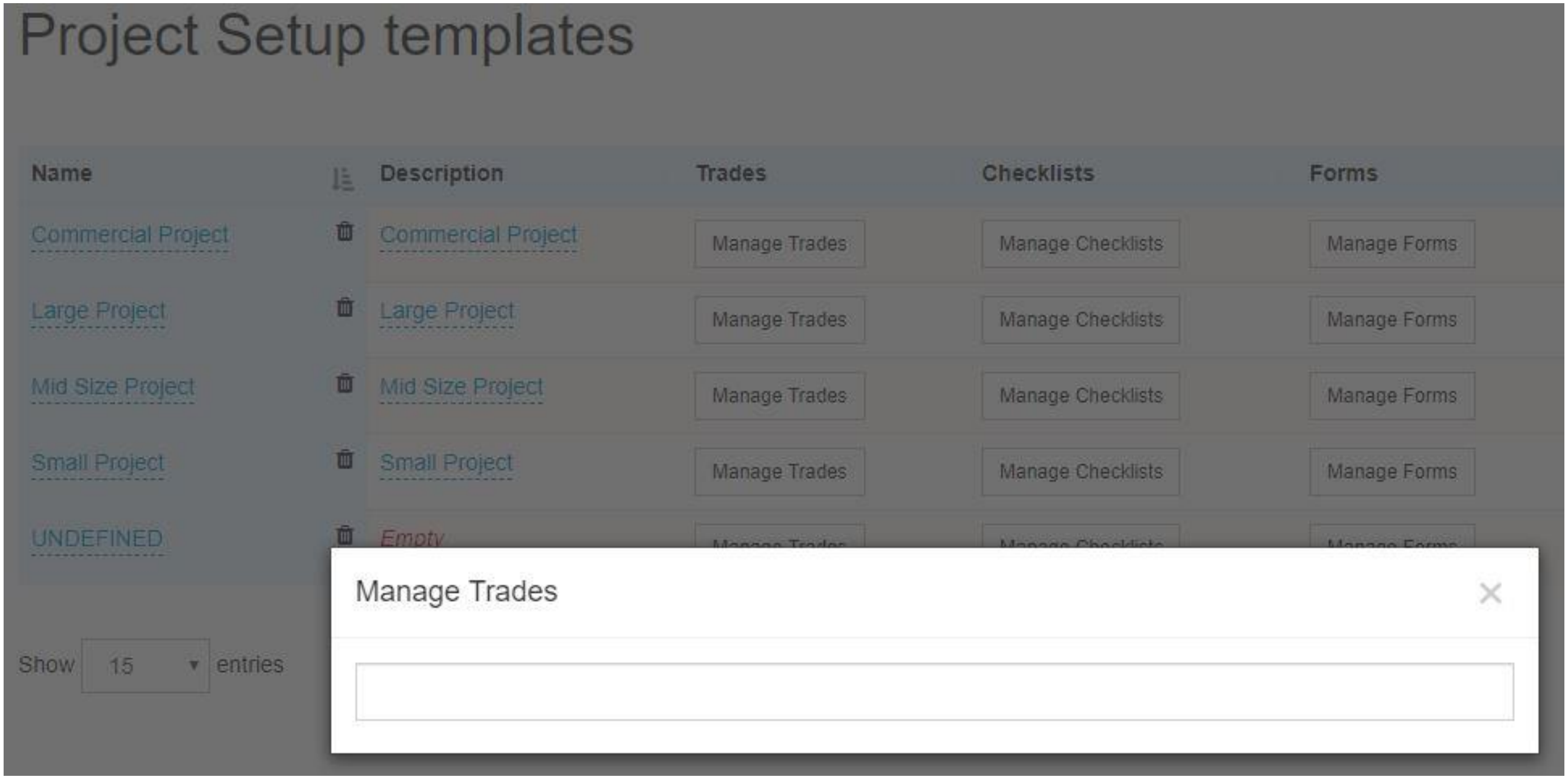
Project Setup Templates

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.

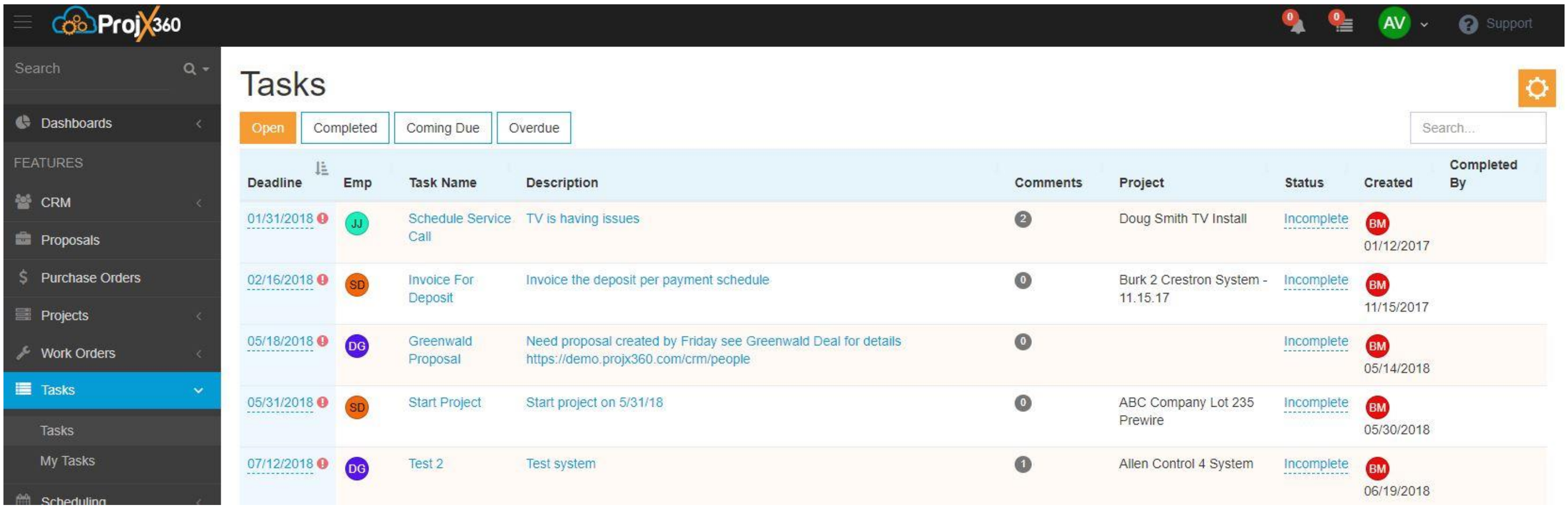


Example: Click on “Manage Trades” button that will display a blank pop up. Click anywhere in the blank field to display which Trades you have added. If your trades are displaying blank make sure you have added them under Settings – Trades.



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.



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.