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Proposals

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Starting Tips

- Proposals and several areas of the software can't be deleted. If you see a trash can icon the item can be removed. 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.
- 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

With ProjX360's Proposal Generation Tool you can quickly and easily create proposals anytime, anywhere. Our user friendly UI allows you to create professional & accurate proposals very quickly, so you can get them to your potential customer and close the deal.

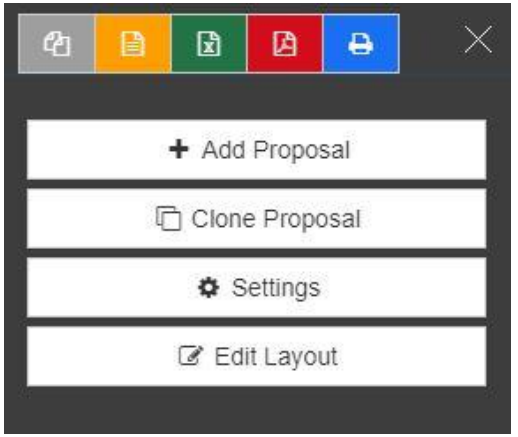
ProjX360's Proposal Generation Tool includes the ability to create custom system packages that fit how you do business. So, if you sell the same 7.1 surround sound system you can save time having to build that on the fly for each proposal by just creating it one time with all the parts & labor then save it as your "Favorite 7.1 Package" in your package manager. Now on future proposals just drag it into your proposal where it populates everything quickly and easily in one shot. You can also assign accessories to products saving you time and help eliminate forgotten "needed" items. For example, on a television you can assign a wall mount, HDMI cable, emitter, etc. to it so every time you drag it into your proposal you will be prompted asking if you want these accessories automatically added. This will reduce your sales team missing all of the small accessory products that costs your company money and causes production delays. Instead by having these products configured properly, you will increase your sales revenue and have happier customers. To make sure your labor is bid accurately you can assign a labor phase and labor hours to a product so that every time that product is dragged into the proposal that labor phase and labor hours come with it. These plus many more features will save your company time and increase your revenue.

Already have the items stocked locally or from a specialized vendor? No problem, you can also manually create one off PO's in ProjX360, track when they are opened by the supplier and get updates from them as the order process through their system and they update with our single point vendor access.

Our Proposal Generation Tool's custom reporting allows you to customize your proposals.

Proposal

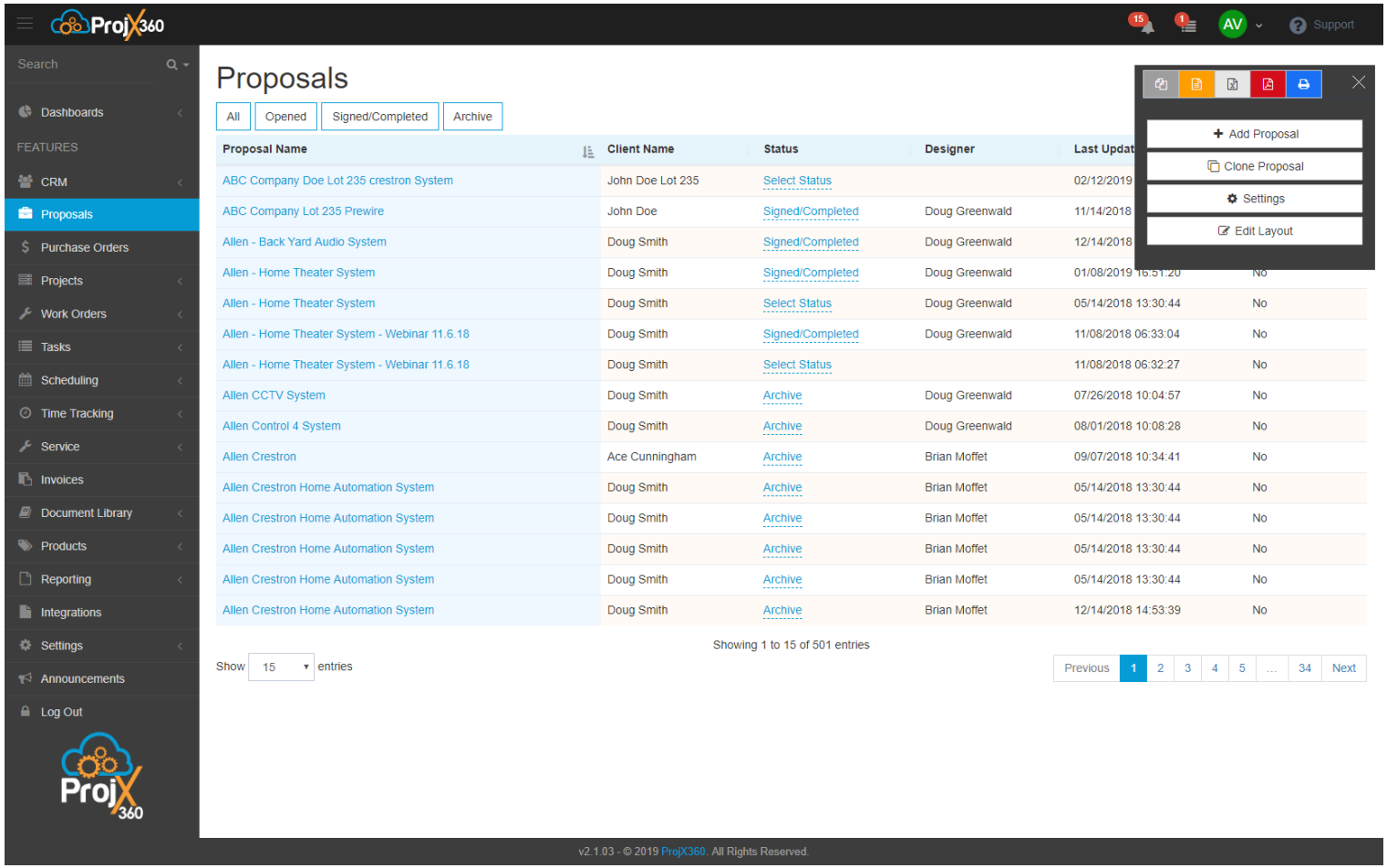
Click the orange cogwheel for menu options.



- **Add Proposal**: Create a new blank proposal. You can also create a Proposal from a Deal if you have a Sales CRM license.
- **Clone Proposal**: Clone an existing proposal.
- **Settings:** Adjust Pricing Rules, Locations, Systems, Payment Schedules, Contracts, Scope of Work.
- **Edit Layout**: This will allow you to adjust the proposal dashboard columns by dragging and dropping the order in which they appear or toggle columns to show/hide.

Settings

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

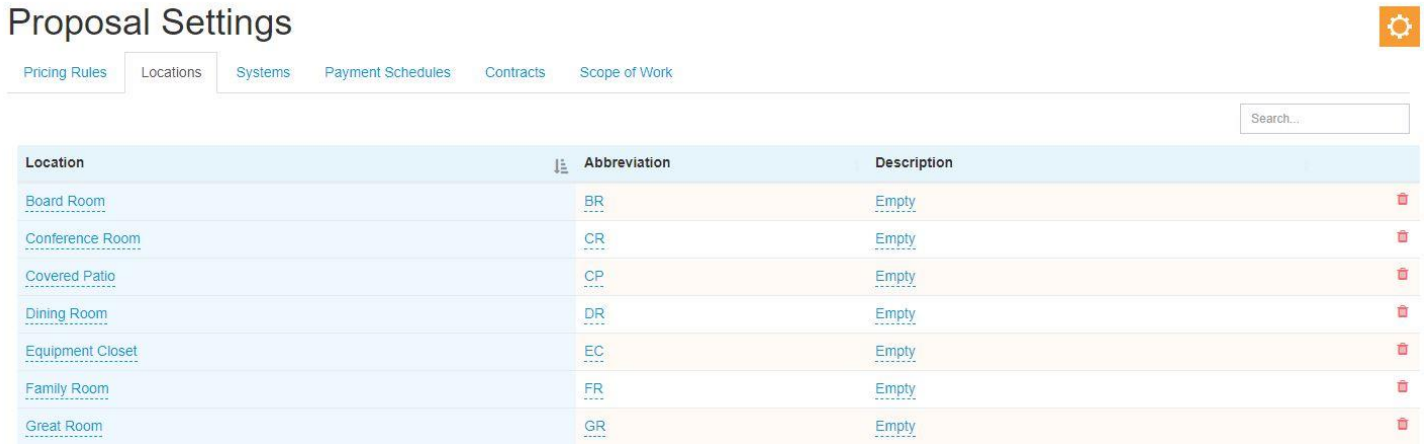


Pricing Rules

Click the orange cogwheel to “+ Add Pricing Rule”. A new entry will be added for you to adjust the Rule Name and Discount. 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.

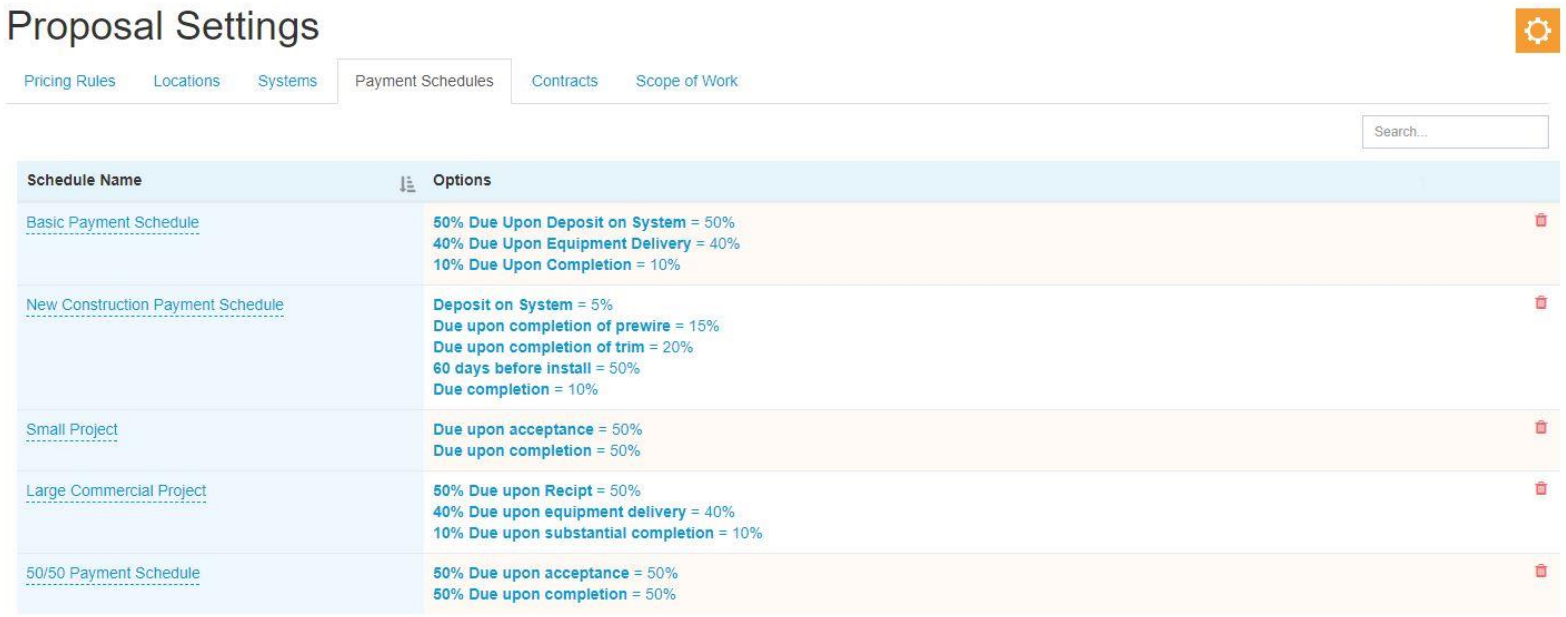


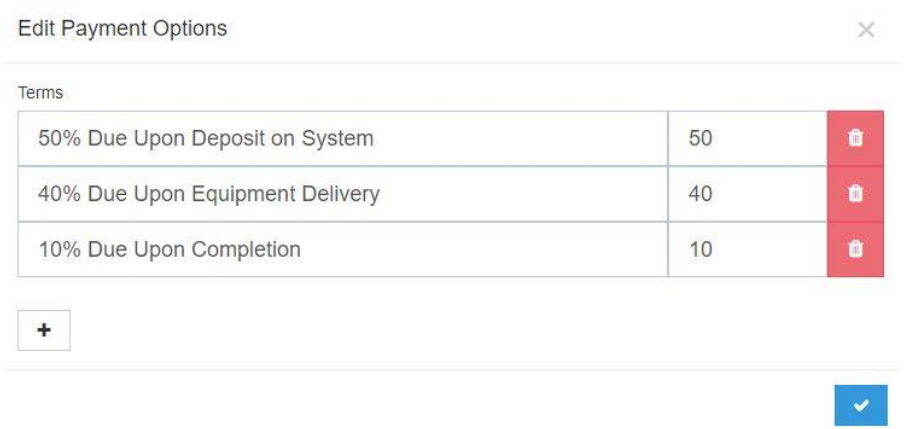
Systems

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.



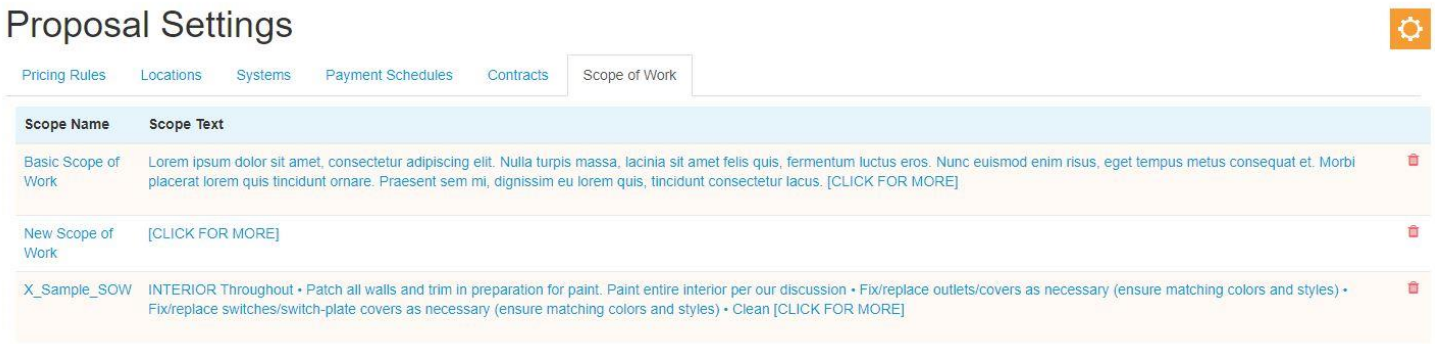


Contracts

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

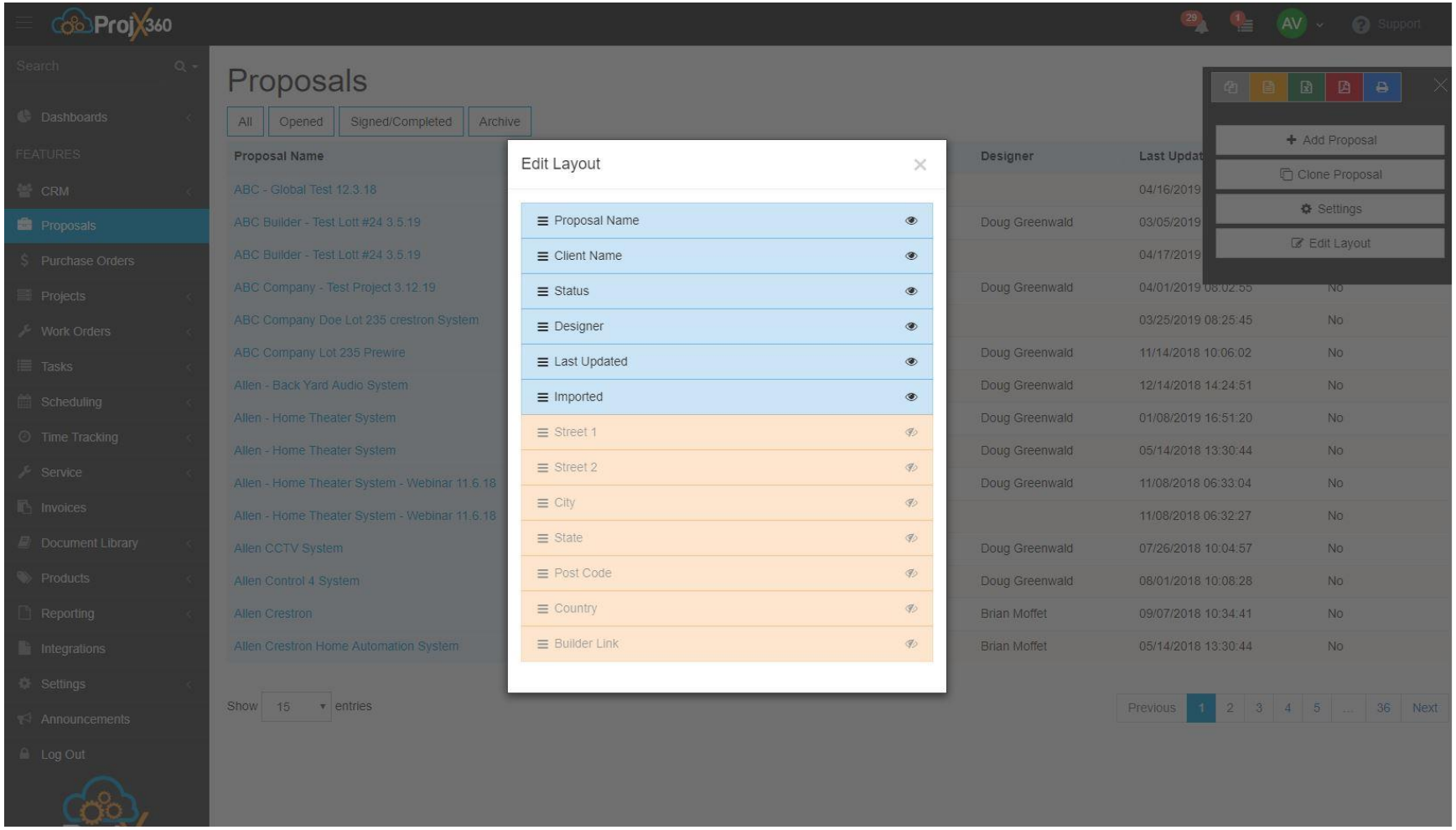
Click the orange cogwheel to “+ Add Scope of Work”. A new entry will be added for you to adjust the Scope Name and Scope Text. **Note:** Scope of Work will appear after the cover page details in your proposal.



Edit Layout

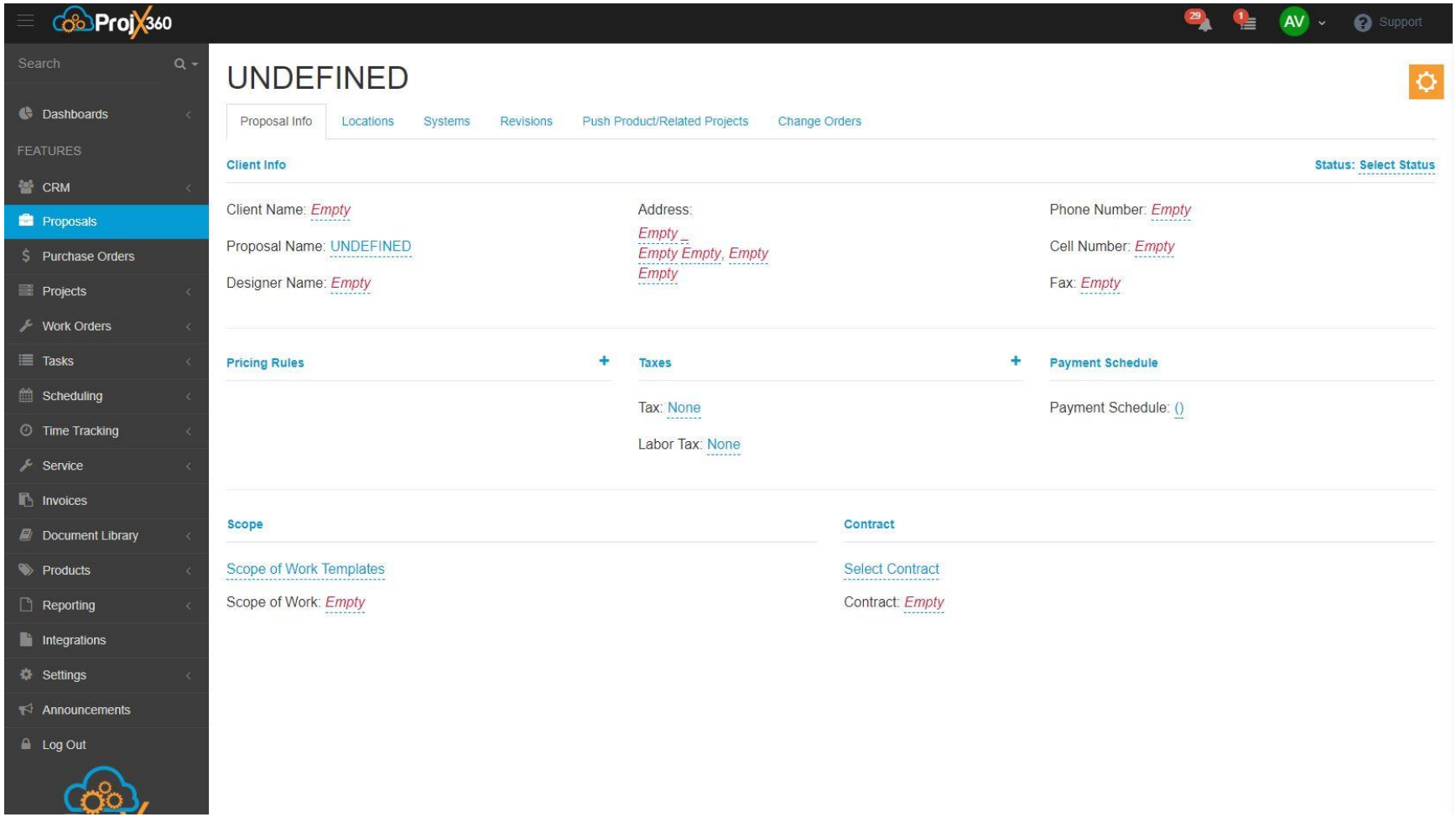
You can drag and drop the order in which columns appear or toggle the eye icon to show/hide columns on the main proposal dashboard.

(Proposal Name, Client Name, Status, Designer, Last Updated, Imported, Street 1, Street 2, City, State, Post Code, Country, Builder Link)

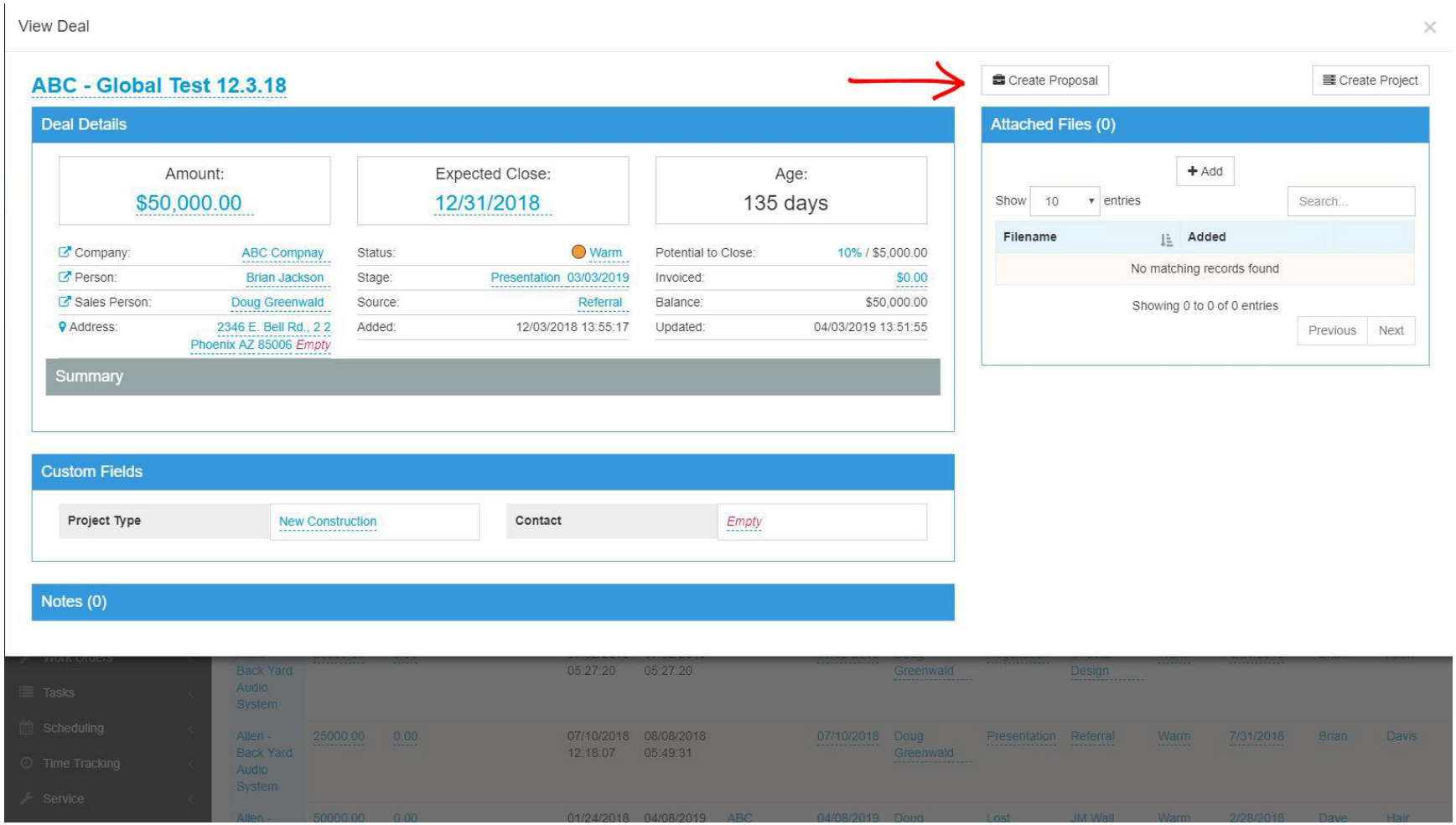


Add Proposal

Go to Proposals from the main menu, click the orange cogwheel, + Add Proposal. This option will give you a blank Proposal.



If you have a Sales CRM license you can also create a Proposal by going to CRM from the main menu. Click on a deal to open it. Click on the Create Proposal button.



Proposal Info

Client name: Once you choose the client name there will be a pop up asking if you want to use info from client. If you choose use info it will carry over the address, phone number details from the contact record.

Proposal Name: Proposal names need to be unique. The best practice is to use the Client name and then what you are doing. Examples – Allen Crestron Home Automation System | Allen, Brian – Home Theater System | Jackson Savant System.

Designer Name: This is the person designing the system. If you are set up to receive proposal notifications the person who is picked will receive these proposal notifications.

Pricing Rules: Click + to Add a New Pricing rule or select from the global pricing rules that were created under Proposal Settings. Then you can choose if it applies to equipment, labor, or both.

Taxes: Click + to Add a New Tax Settings Name/Rate/Type or select from the global tax settings that were created under Settings, Tax Settings.

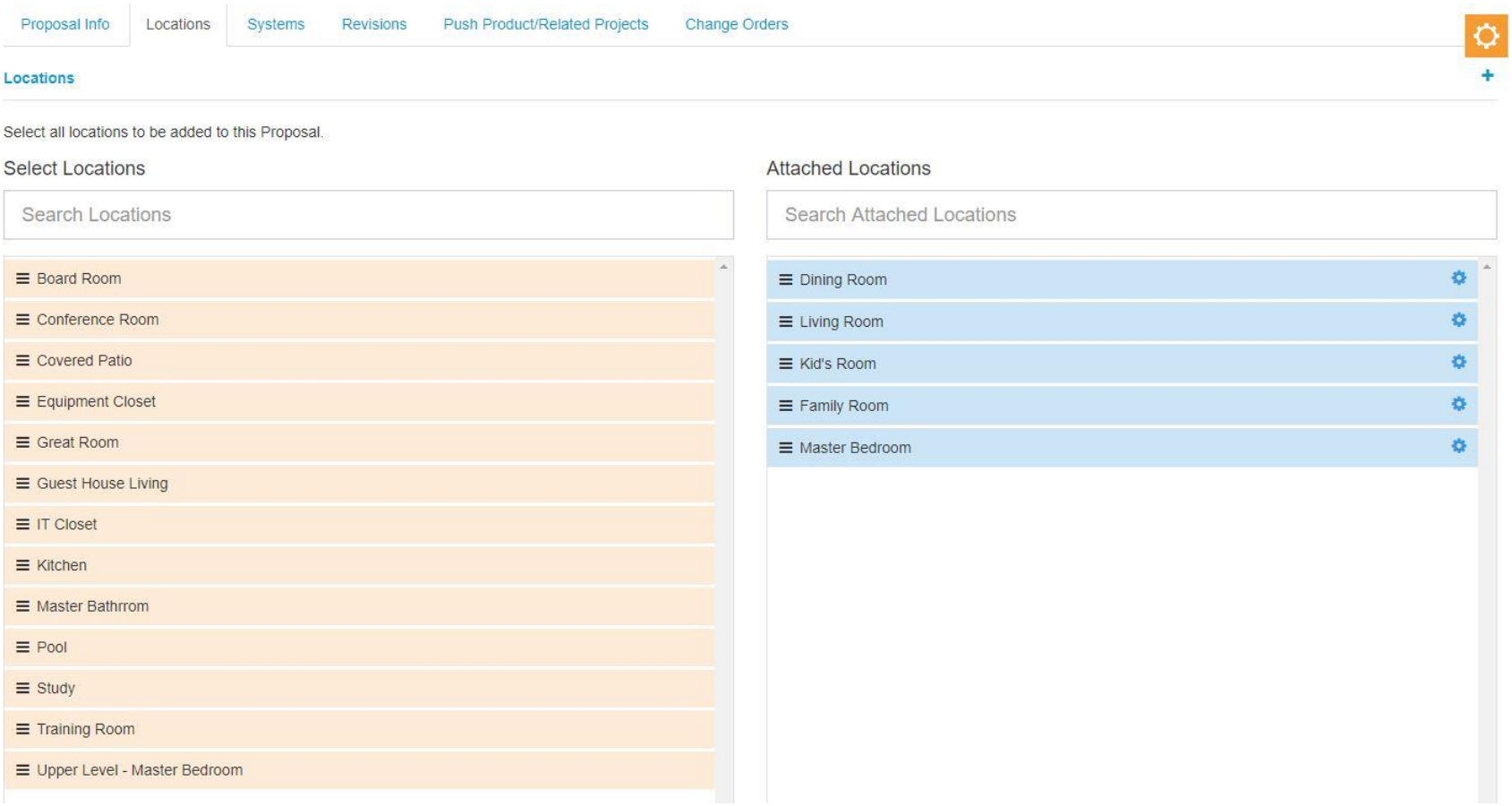
Payment Schedule: Click to select from a global payment schedule that was created under Proposal Settings. If you plan on progressive invoicing a payment schedule needs to be selected prior to generating a proposal revision.

Scope: Click to select from your global Scope of Work Templates or click on Empty to start typing a new scope of work.

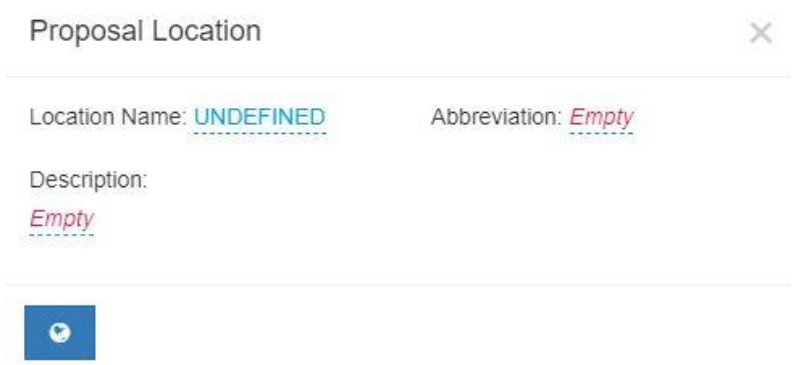
Contract: Click to select from your global Contracts or click on Empty to start typing a new contract.

Locations

Select all locations to be added to your Proposal. Drag and drop the global locations you will be using for this proposal over to the right side. You can drag and drop the location order or click the blue cogwheel to remove the location.

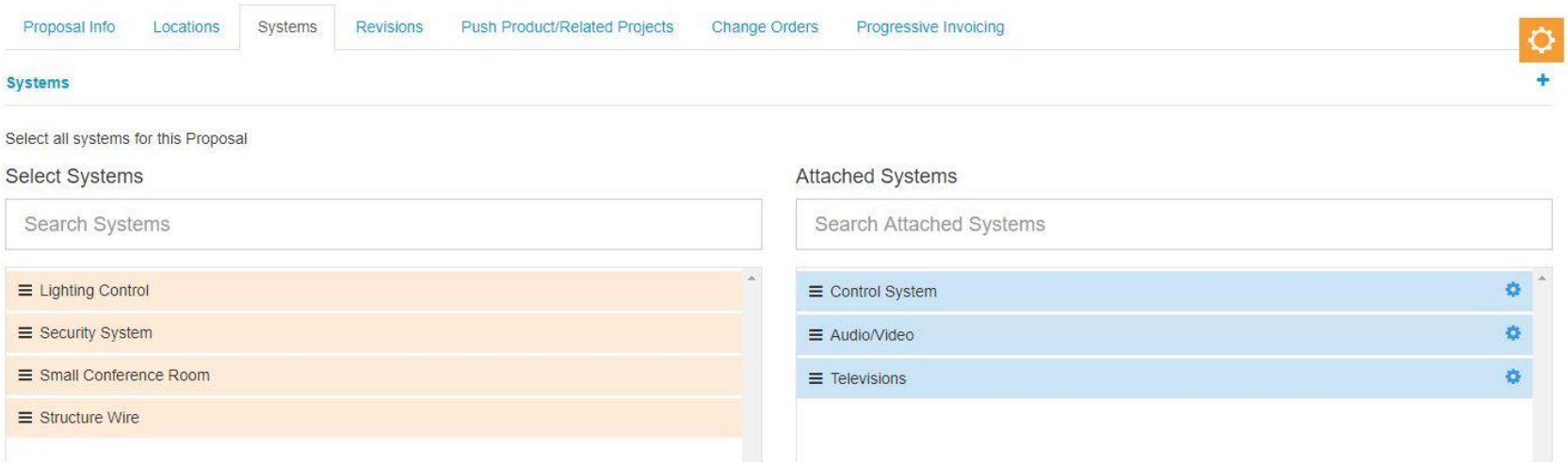


Click the blue + shown above in the top right corner to add a new location specific to just this proposal. Once you type it just use the X to close the pop up modal. If you also want to make it available across all proposals click on the globe icon.



Systems

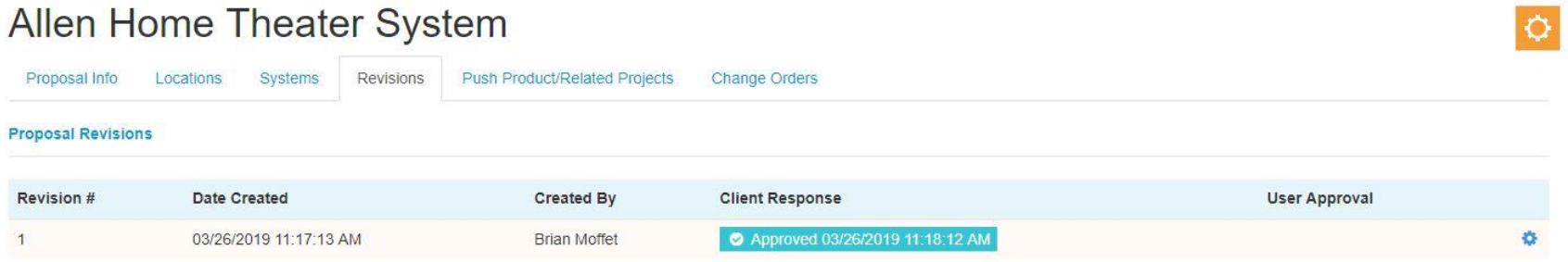
Select all systems to be added to your Proposal. Drag and drop the global systems you will be using for this proposal over to the right side. You can drag and drop the location order or click the blue cogwheel to remove the system.



Click the blue + shown above in the top right corner to add a new system specific to just this proposal. Once you type it just use the X to close the pop up modal. If you also want to make it available across all proposals click on the globe icon.

Revisions

All of your proposal revisions will be listed here. You can click on the blue cogwheel to show the generated revisions or to delete the revision.

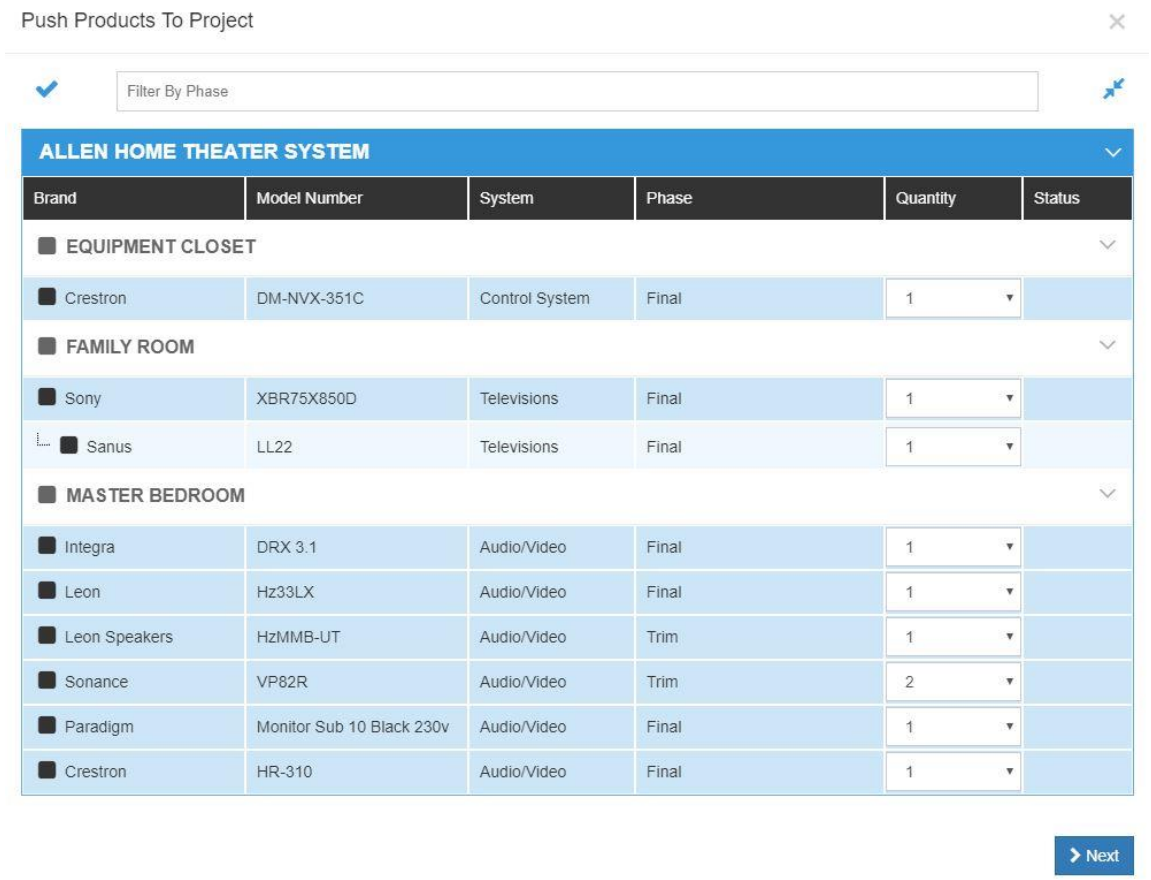


Push Product/Related Projects

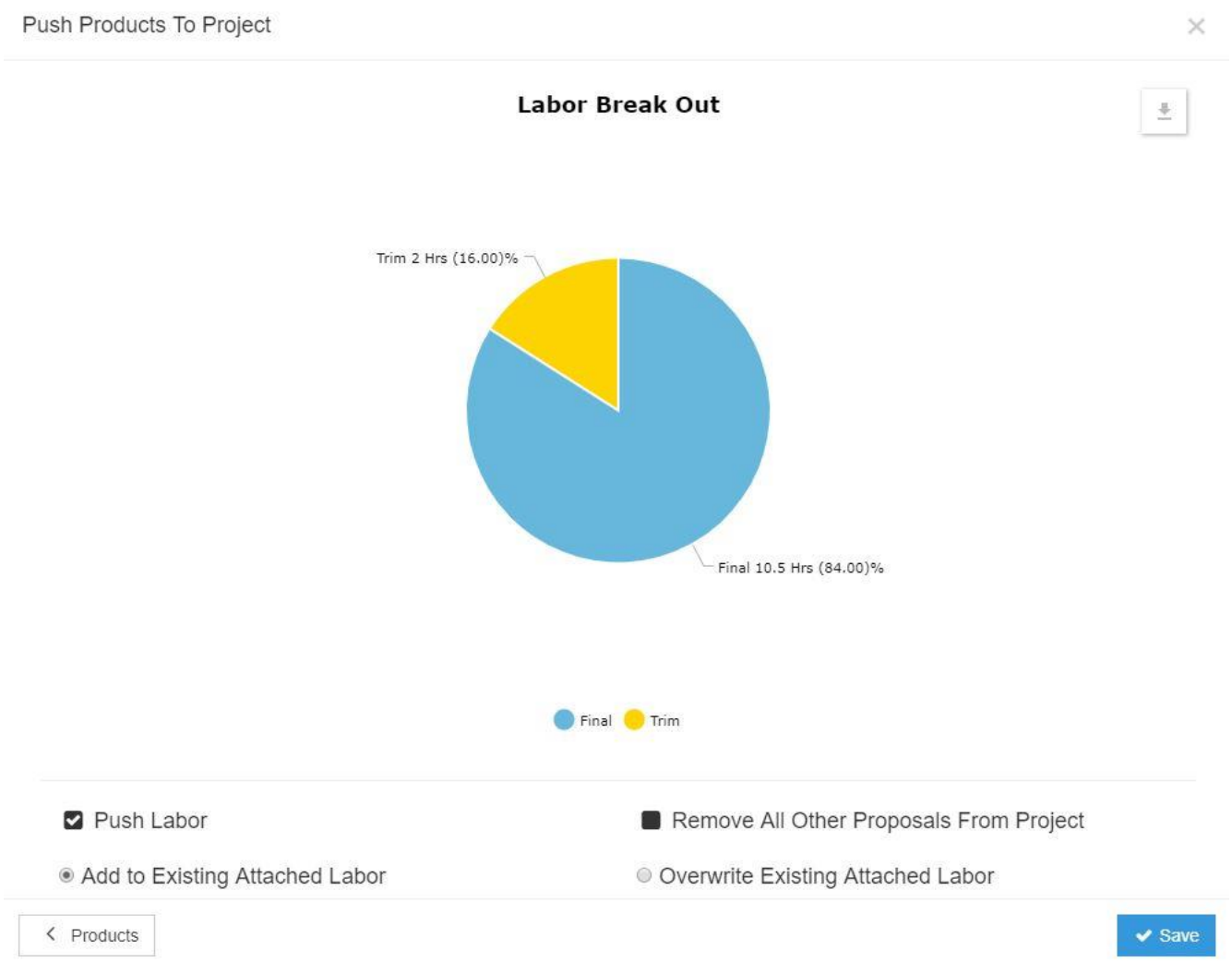
Once your proposal has been approved click the blue + to push over your proposal product into your project. Or you can create a new project by clicking the orange cogwheel and selecting “Create Project”.

Select from the project list to relate your proposal to the project.

Select the blue check mark to choose all locations/product to push into the project or go through and place a check mark next to each location/product you want to push into the project. Click Next.

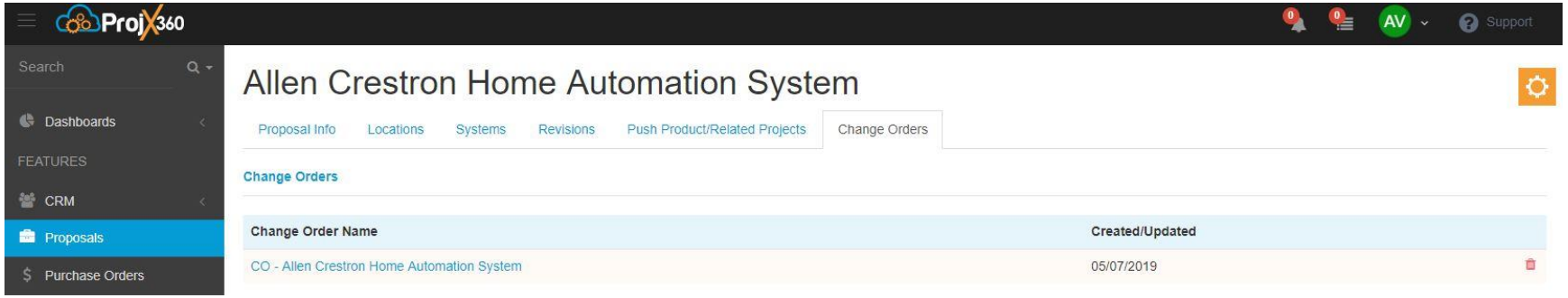


On this screen you will see your labor break out by phase. There will be options below to Push Labor, Add to Existing Attached Labor, Remove All Other Proposals from Project or Overwrite Existing Attached Labor. If this is a brand new project generally you leave the default settings already checked.

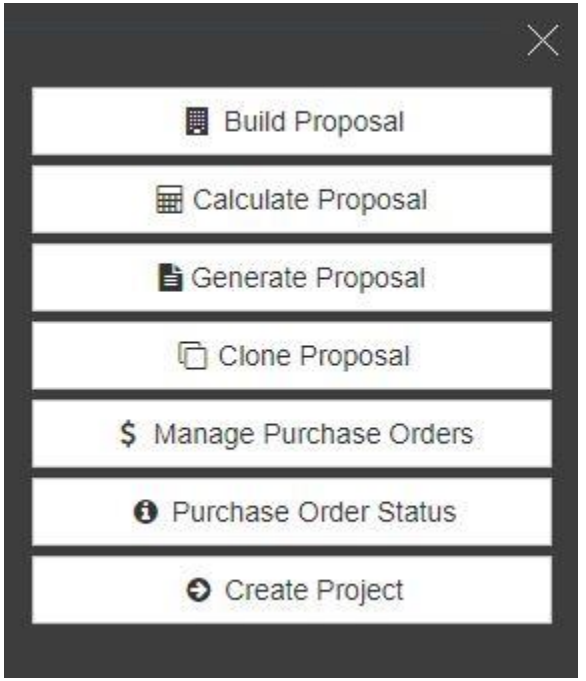

Push Products To Project
Labor Break Out
Trim 2 Hrs (16.00)%
Final 10.5 Hrs (84.00)%
Final
Trim
Push Labor
Remove All Other Proposals From Project
Add to Existing Attached Labor
Overwrite Existing Attached Labor
Products
Save

Change Orders

The Change Orders tab will show you any change orders generated. See “Generate Change Orders” to see how to create a Change Order.



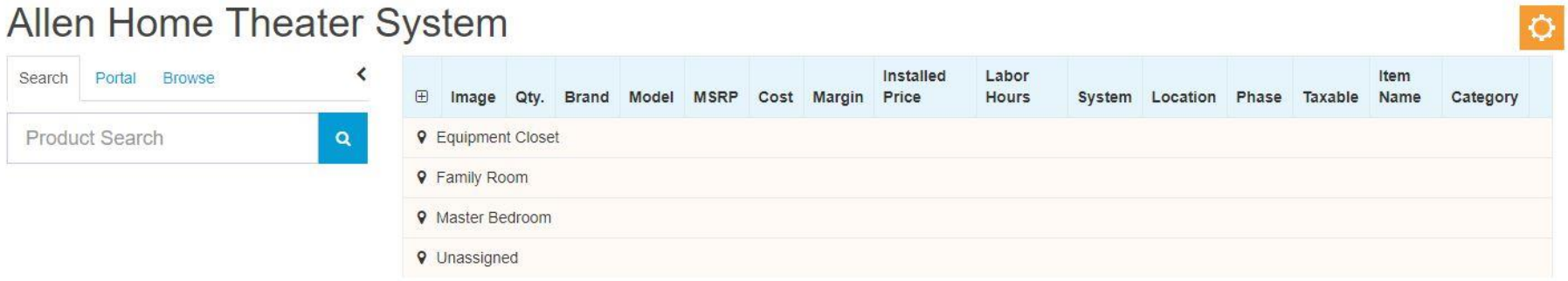
Once all of your Proposal Info, Locations, Systems have been added click on the orange cogwheel for the following options.



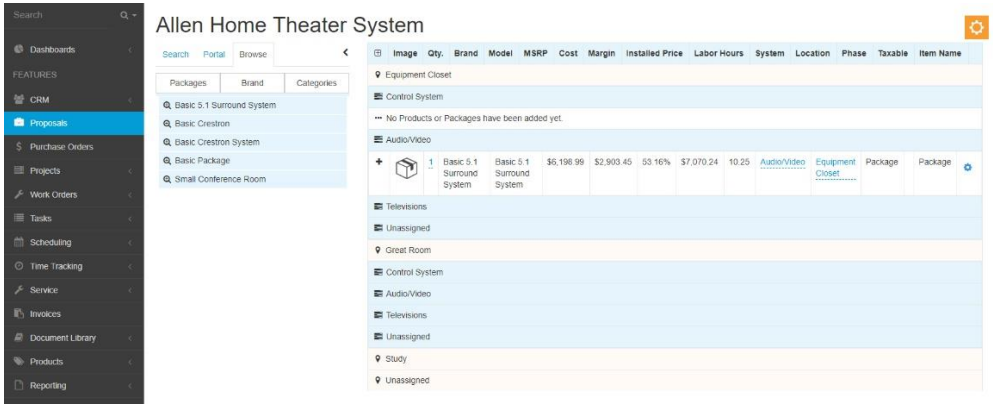
Build Proposal

This is where you build your proposal.

You can Search, bring in product from Portal or Browse by Packages, Brand or Categories to add product into the builder.



Click on location to expand it, then drag and drop your products from the left side over into each System by Location. You can also arrange product order by dragging and dropping.



To clone product click the blue cogwheel and select “Clone Product”. Then you can select all of the locations you want that product in.

Calculate Proposal

Once all product has been placed into the builder you can click the orange cogwheel, calculate proposals to see a proposal summary of product, labor and totals. If you click the cloud icon you can download as a PDF.

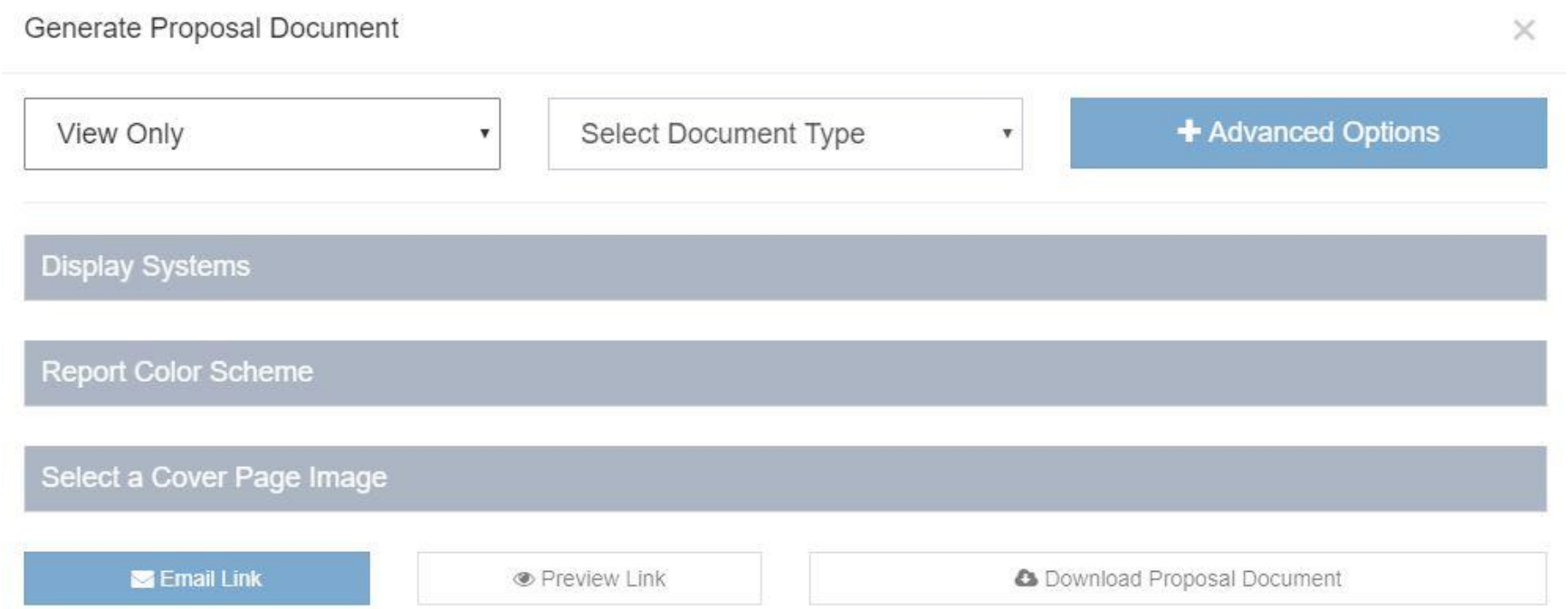
Proposal Summary

Product		Labor		Totals	
Cost / MSRP:	$7,112.85/ $17,725.98	Labor Price:	$1,140.00 / $2,422.50	Total Margin / Markup:	57.16%/ 133.40%
Equipment Discount / Surcharge:	($886.30)	Labor Discount / Surcharge:	$0.00	Total Discount / Surcharge:	($886.30)
Margin / Markup:	57.76%/ 136.75%	Labor Margin / Markup:	52.94%/ 112.50%	**Proposal Total:**	**$19,262.18**
Total w/Tax (7.9500%):	$18,178.44	Total w/Labor Tax (%):	$2,422.50	**Proposal Total w/Tax:**	**$20,600.94**

Location	Equip. Cost	Equip. MSRP	Margin	Markup	Labor Cost	Labor Price	Labor Margin
− Equipment Closet Totals	**$3,023.45**	**$6,428.99**	**52.97%**	**112.64%**	**$490.00**	**$1,041.25**	**52.94%**
Integra DRX 3.1	$540.00	$1,000.00	46.00%	85.19%	$120.00	$255.00	52.94%
Leon Hz33LX	$898.00	$1,995.00	54.99%	122.16%	$60.00	$127.50	52.94%
Leon Speakers HzMMB-UT	$90.00	$135.00	33.33%	50.00%	$40.00	$85.00	52.94%
Sonance VP82R	$680.00	$1,700.00	60.00%	150.00%	$40.00	$85.00	52.94%
Paradigm Monitor Sub 10 Black 230v	$487.50	$934.00	47.81%	91.59%	$20.00	$42.50	52.94%
Binary B6-HD-1	$7.95	$34.99	77.28%	340.13%	$10.00	$21.25	52.94%
Crestron HR-310	$200.00	$400.00	50.00%	100.00%	$120.00	$255.00	52.94%
ProjX360 7.14.17	$120.00	$230.00	47.83%	91.67%	$80.00	$170.00	52.94%
+ Great Room Totals	**$985.95**	**$4,698.00**	**79.01%**	**376.49%**	**$120.00**	**$255.00**	**52.94%**
+ Study Totals	**$3,103.45**	**$6,598.99**	**52.97%**	**112.63%**	**$530.00**	**$1,126.25**	**52.94%**
+ Unassigned Totals	$0.00	$0.00	Cannot Calculate	Cannot Calculate	$0.00	$0.00	Cannot Calculate

Generate Proposal

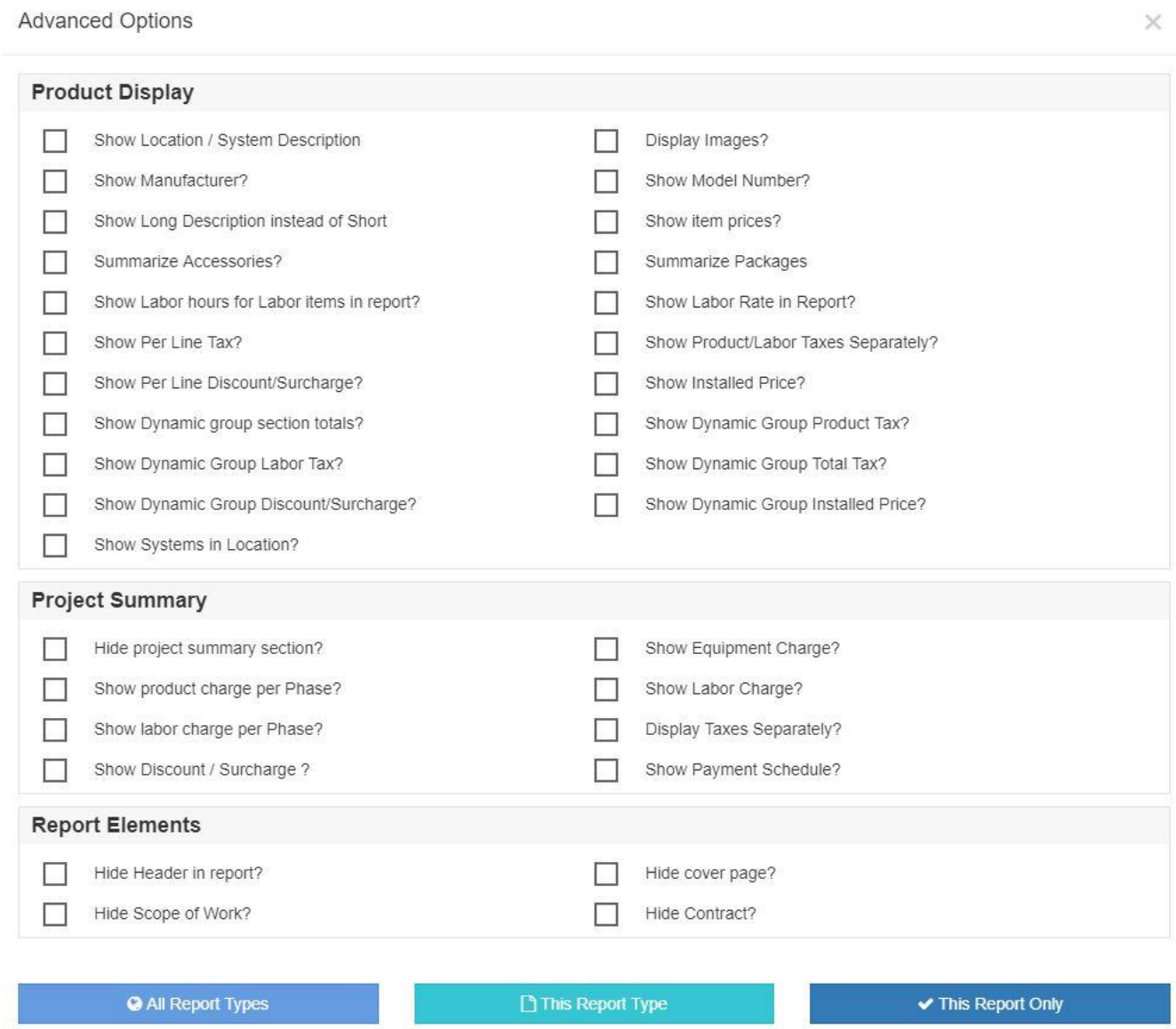
Once you have finished adding everything to the builder you can click the orange cogwheel, generate proposal.



View Only will be selected by default. You will notice Email Link and Preview Link are not available to click on. Once you have viewed the proposal and it's ready to be sent to the client change the View Only option to Generate Revision. Once Generate Revision is selected you will have options to Email Link and Preview Link.

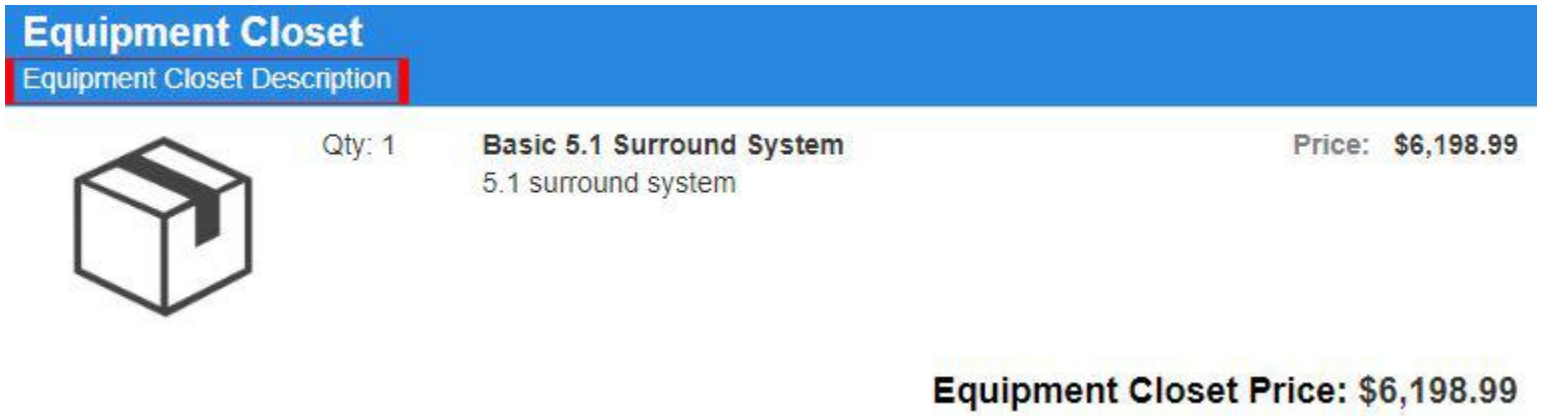
Select Document Type: Proposals by Category, Proposals by Location, Proposals by Manufacturer, Proposals by System.

Advanced Options: Custom options for product display, project summary and report elements for the proposal.

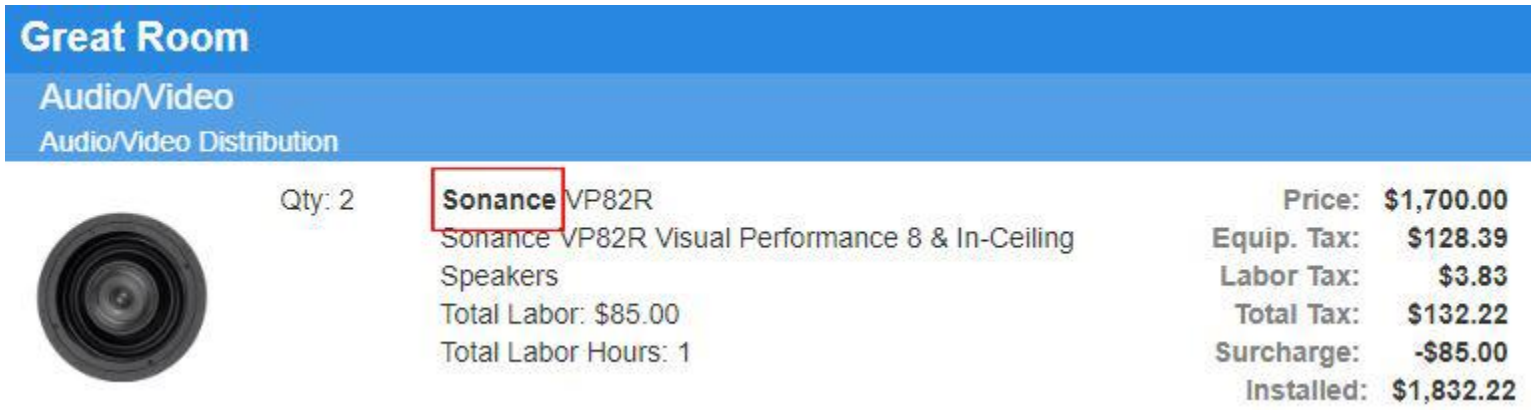


Product Display

Show Location / System Description



Show Manufacturer?



Show Long Description instead of Short

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R

Sonance VP82R Visual Performance 8 & In-Ceiling Speakers

Total Labor: $85.00

Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Summarize Accessories? - This allows you to hide or show accessories attached to the product.

Televisions

Televisions

Qty: 1

Sony XBR75X850D ** Accessories included **

Sony XBR-75X850D

Total Labor: $170.00

Total Labor Hours: 2

Price:	$2,998.00
Equip. Tax:	$226.42
Labor Tax:	$7.65
Total Tax:	$234.07
Surcharge:	-$149.90
Installed:	$3,252.17

Show Labor Hours for Labor items in report?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Show Per Line Tax?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Show Per Line Discount/Surcharge - This is created within the pricing rule feature.

Equipment Closet

Qty: 1

Basic 5.1 Surround System
5.1 surround system
Total Labor: $871.25
Total Labor Hours: 10.25

Price:	$6,198.99
Equip. Tax:	$468.18
Labor Tax:	$39.21
Total Tax:	$507.38
Discount:	(-$309.95)
Installed:	$7,267.68

Great Room

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Show Dynamic group section totals?

Great Room

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Qty: 1

Sony XBR75X850D ** Accessories included **
Sony XBR-75X850D
Total Labor: $170.00
Total Labor Hours: 2

Price:	$2,998.00
Equip. Tax:	$226.42
Labor Tax:	$7.65
Total Tax:	$234.07
Surcharge:	-$149.90
Installed:	$3,252.17

Great Room Price: $4,698.00

Show Dynamic Group Labor Tax?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Audio/Video Price:	$1,700.00
Audio/Video Product Tax:	$128.39
Audio/Video Labor Tax:	$3.83
Audio/Video Total Tax:	$132.22
Audio/Video Discount:	(-$85.00)
Audio/Video Installed Total:	$1,832.22

Show Dynamic Group Discount/Surcharge?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Audio/Video Price:	$1,700.00
Audio/Video Product Tax:	$128.39
Audio/Video Labor Tax:	$3.83
Audio/Video Total Tax:	$132.22
Audio/Video Discount:	(-$85.00)
Audio/Video Installed Total:	$1,832.22

Show Systems in Location?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Display Images?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Show Model Number?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Show item prices?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Summarize Packages - This allows you to show or hide the items in a package.

Equipment Closet

Audio/Video

Audio/Video Distribution

Qty: 1

Basic 5.1 Surround System
5.1 surround system
Total Labor: $871.25
Total Labor Hours: 10.25

Price:	$6,198.99
Equip. Tax:	$468.18
Labor Tax:	$39.21
Total Tax:	$507.38
Discount:	(-$309.95)
Installed:	$7,267.68

Show Labor Rate in Report?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Show Product/Labor Taxes Separately?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Show Installed Price?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Show Dynamic Group Product Tax?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Audio/Video Price:	$1,700.00
Audio/Video Product Tax:	$128.39
Audio/Video Labor Tax:	$3.83
Audio/Video Total Tax:	$132.22
Audio/Video Discount:	(-$85.00)
Audio/Video Installed Total:	$1,832.22

Show Dynamic Group Total Tax?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Audio/Video Price:	$1,700.00
Audio/Video Product Tax:	$128.39
Audio/Video Labor Tax:	$3.83
Audio/Video Total Tax:	$132.22
Audio/Video Discount:	(-$85.00)
Audio/Video Installed Total:	$1,832.22

Show Dynamic Group Installed Price?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
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Audio/Video Price:	$1,700.00
Audio/Video Product Tax:	$128.39
Audio/Video Labor Tax:	$3.83
Audio/Video Total Tax:	$132.22
Audio/Video Discount:	(-$85.00)
Audio/Video Installed Total:	$1,832.22

Show System totals per Location?

Great Room

Audio/Video

Audio/Video Distribution

Qty: 2

Sonance VP82R
Sonance VP82R Visual Performance 8 & In-Ceiling Speakers
Total Labor: $85.00
Total Labor Hours: 1

Price:	$1,700.00
Equip. Tax:	$128.39
Labor Tax:	$3.83
Total Tax:	$132.22
Surcharge:	-$85.00
Installed:	$1,832.22

Audio/Video Price:	$1,700.00
Audio/Video Product Tax:	$128.39
Audio/Video Labor Tax:	$3.83
Audio/Video Total Tax:	$132.22
Audio/Video Discount:	(-$85.00)
Audio/Video Installed Total:	$1,832.22

Project Summary

Hide project summary section

Payment Schedule

50% Due Upon Deposit on System:	**$0.00**
40% Due Upon Equipment Delivery :	**$0.00**
10% Due Upon Completion :	**$0.00**

Contract

This is an official agreement between Brian Allen and ProjX360

Show product charge per Phase?

Proposal Summary

Equipment:	**$17,495.98**
Final Phase Labor:	**$1,827.50**
Trim Phase Labor:	**$425.00**
Customer Discount:	**($874.80)**
Equipment Taxes:	**$1,321.38**
Labor Taxes:	**$101.36**
Grand Total:	**$20,296.43**

Show labor charge per Phase?

Proposal Summary	
Final Phase Equipment:	$12,125.98
Trim Phase Equipment:	$5,370.00
Final Phase Labor:	$1,827.50
Trim Phase Labor:	$425.00
Customer Discount:	($874.80)
Equipment Taxes:	$1,321.38
Labor Taxes:	$101.36
Grand Total:	$20,296.43

Show Discount / Surcharge? - This is created with the pricing rule feature.

Proposal Summary	
Final Phase Equipment:	$12,125.98
Trim Phase Equipment:	$5,370.00
Final Phase Labor:	$1,827.50
Trim Phase Labor:	$425.00
Customer Discount:	($874.80)
Equipment Taxes:	$1,321.38
Labor Taxes:	$101.36
Grand Total:	$20,296.43

Show Equipment Charge?

Proposal Summary	
Final Phase Equipment:	$12,125.98
Trim Phase Equipment:	$5,370.00
Final Phase Labor:	$1,827.50
Trim Phase Labor:	$425.00
Customer Discount:	($874.80)
Equipment Taxes:	$1,321.38
Labor Taxes:	$101.36
Grand Total:	$20,296.43

Show Labor Charge?

Proposal Summary	
Final Phase Equipment:	$12,125.98
Trim Phase Equipment:	$5,370.00
Labor:	$2,252.50
Customer Discount:	($874.80)
Equipment Taxes:	$1,321.38
Labor Taxes:	$101.36
Grand Total:	$20,296.43

Display Taxes Separately?

Proposal Summary

Final Phase Equipment:	**$12,125.98**
Trim Phase Equipment:	**$5,370.00**
Labor:	**$2,252.50**
Customer Discount:	**($874.80)**
Equipment Taxes:	**$1,321.38**
Labor Taxes:	**$101.36**
Grand Total:	**$20,296.43**

Show Payment Schedule?

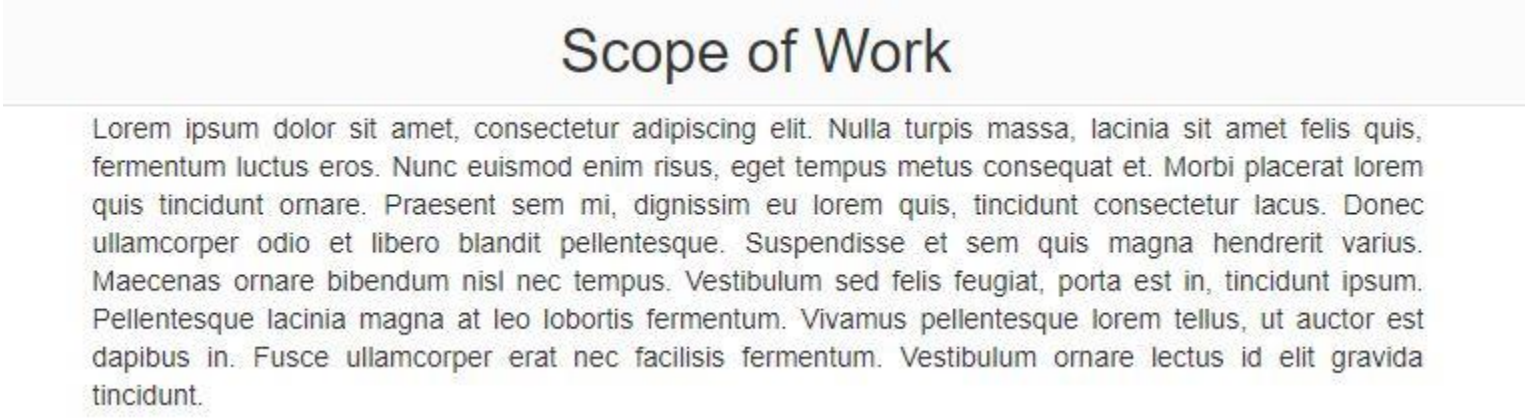
Payment Schedule

50% Due Upon Deposit on System:	**$10,148.21**
40% Due Upon Equipment Delivery :	**$8,118.57**
10% Due Upon Completion :	**$2,029.64**

Report Elements

Hide Header in report

Hide Scope of Work



Hide cover page

ProjX360 Proposal

Date: 04/18/2019

Allen Home Theater System

Doug Smith

19937 E. Thronton Rd.
Queen Creek Arizona 85142

Presented By:

ProjX360

15995 N. Dial Blvd. Ste 5
Scottsdale, AZ 85260

Hide Contract?

Display Systems: Place a check next to which systems you want displayed. This is a filtering feature to filter by system.

Report Color Scheme: By default the ProjX360 color scheme will be selected. You don't have to click +Add New unless you want to add in a secondary report color scheme. To revise the default one that is selected just click on the "ProjX360 Blue" title and change to your own and click each color to revise to your own company color palette.

Select a Cover Page Image: Upload custom images to use for the proposal report cover page.

Email Link Button: Will be active once you change "View Only" to "Generate Revision".

Preview Link Button: Will be active once you change "View Only" to "Generate Revision".

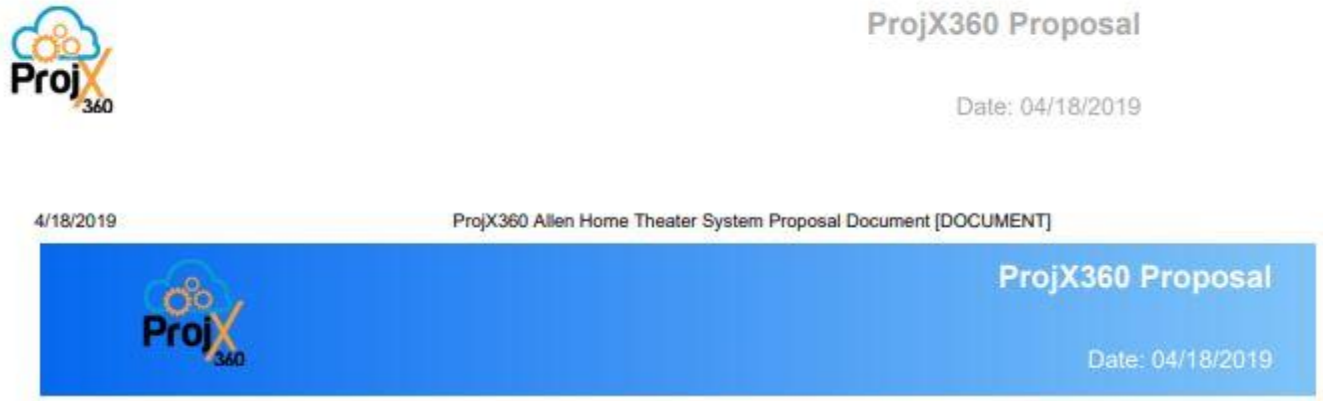
Download Proposal Document: Preview your completed Proposal in your browser.

Over to the right side of your Proposal you will see Formatting Tips!

- Font Size: Increase/Decrease font sizes.
- Show Hide Elements: Proposal Name, Client Info, Cover Image or Presented By.

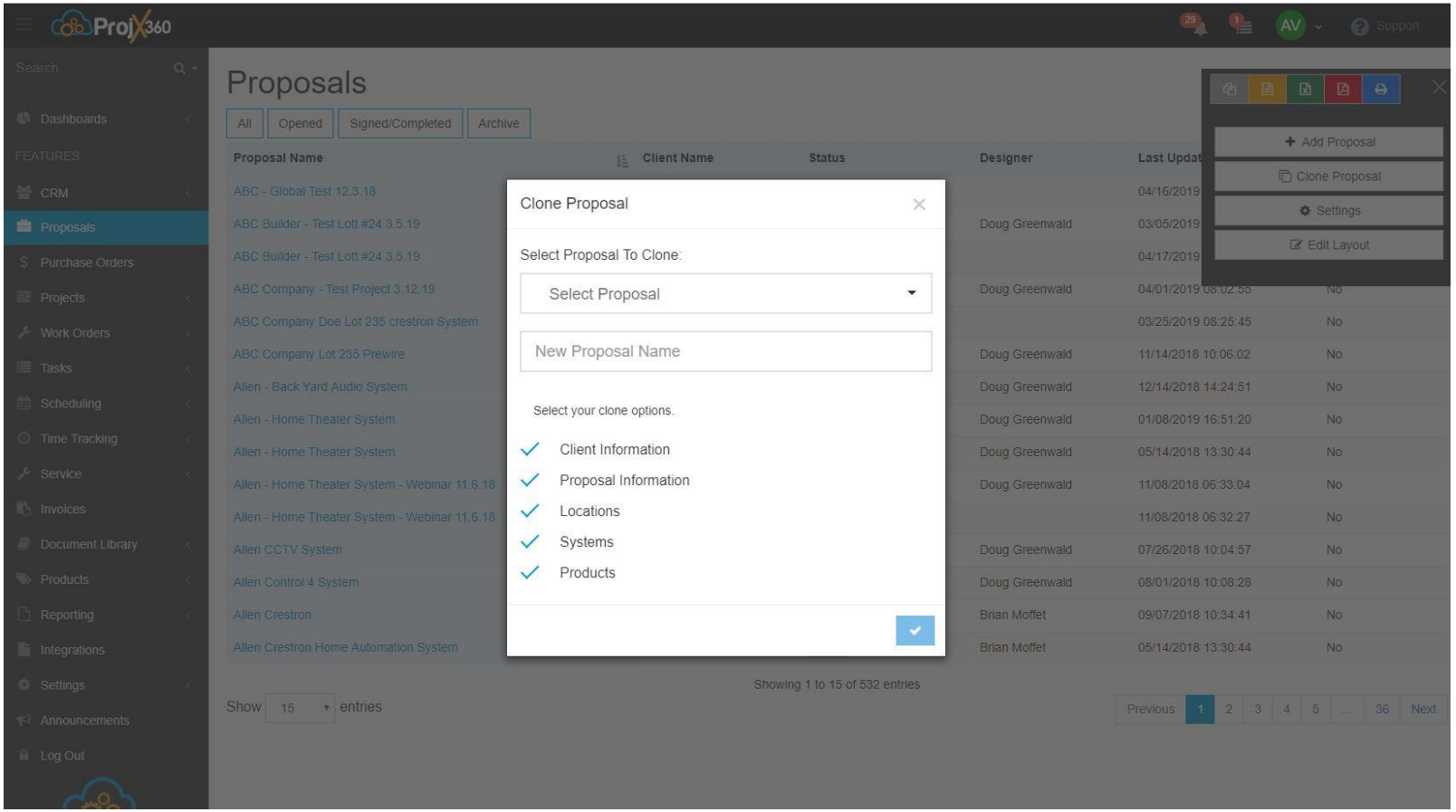
Save Proposal as a PDF: Click the print icon next to formatting tips. Change “Destinations” from your printer to “Save as PDF”.

Under your print settings, under more settings you can show/hide “Headers and Footers” and “Background graphics”.



Clone Proposal

Click Proposals from the main menu. Click the orange cogwheel, Clone Proposal.
Select Proposal to Clone, type in the New Proposal Name and Select your clone options. (Client information, proposal information, locations, systems, products).

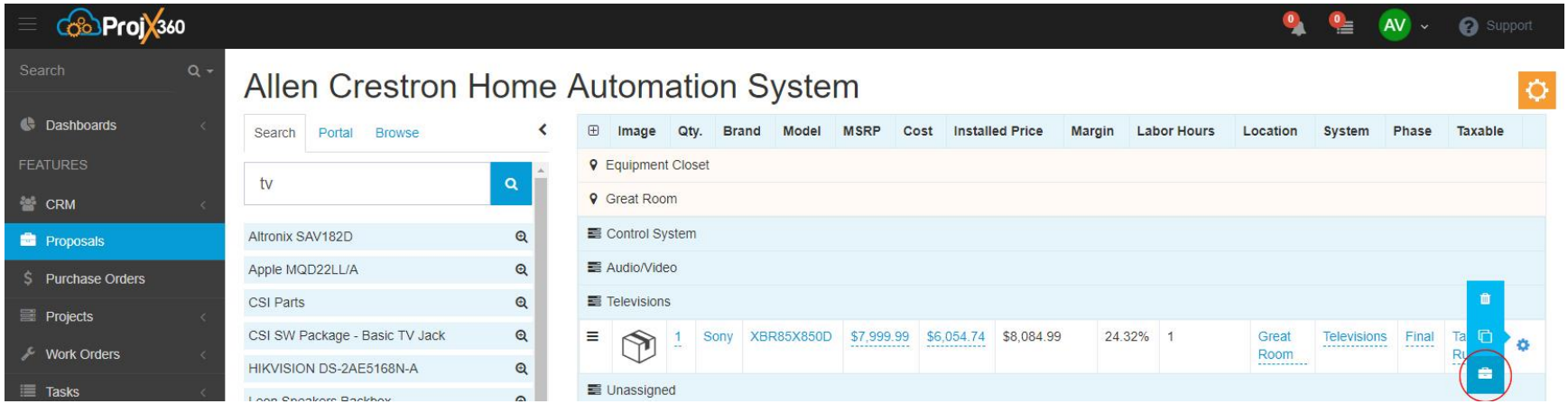


Create Project

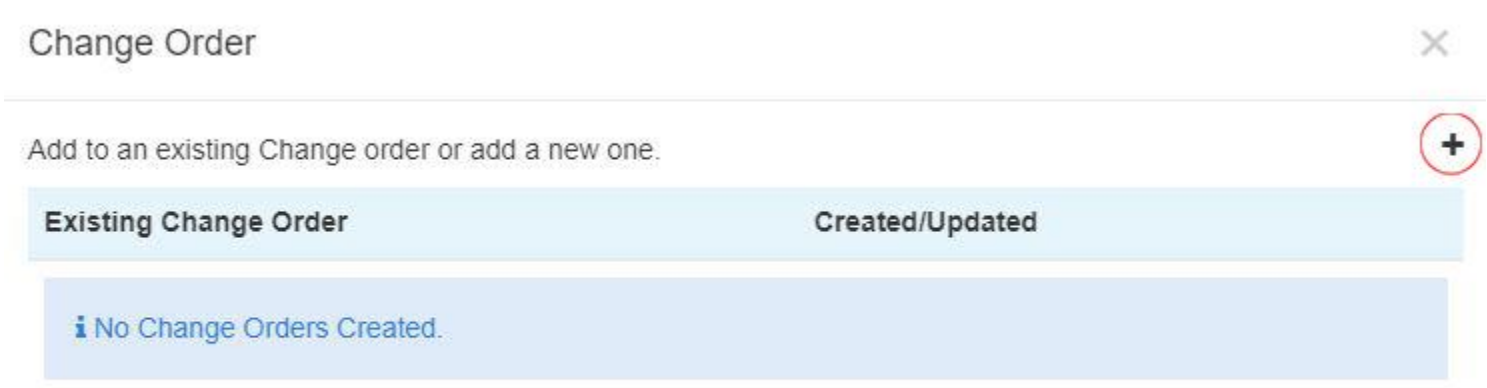
Click on the orange cogwheel, Create Project. We recommend setting up Projects once a Proposal has been approved. Note: A project is a location.

Generate Change Orders

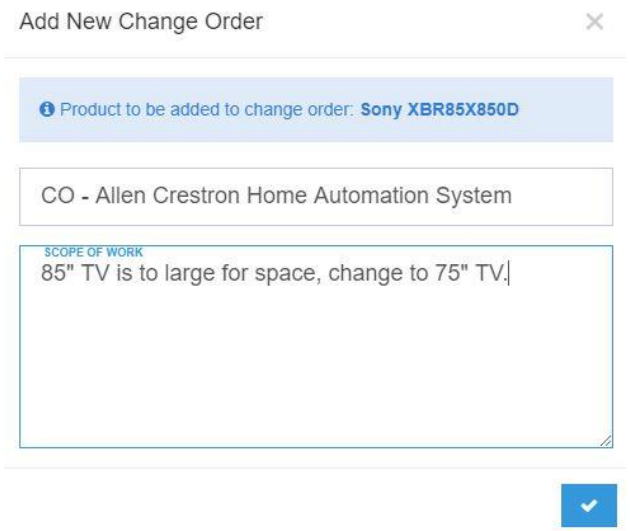
Proposals, click on the Proposal Name you want to generate the Change Order for. Click the Orange Cogwheel, Build Proposal. Locate the item you wish to change and click the blue cogwheel, click the briefcase icon.



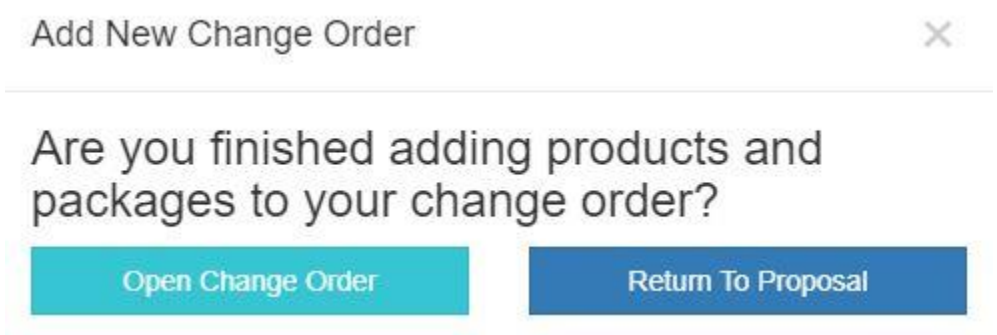
Click the “+” to Add New Change Order.



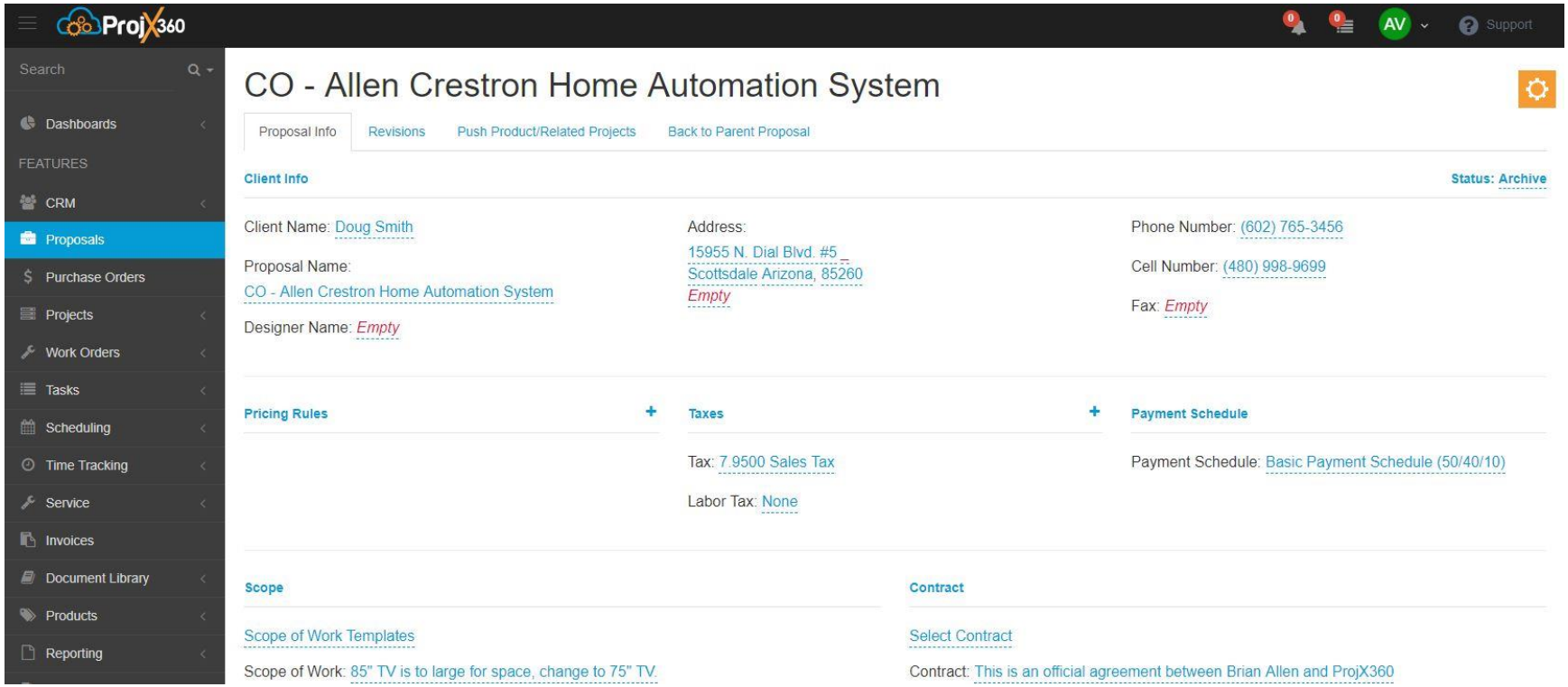
Adjust your Change Order Name and Scope of Work if needed. Example shown. Click the blue check to save.



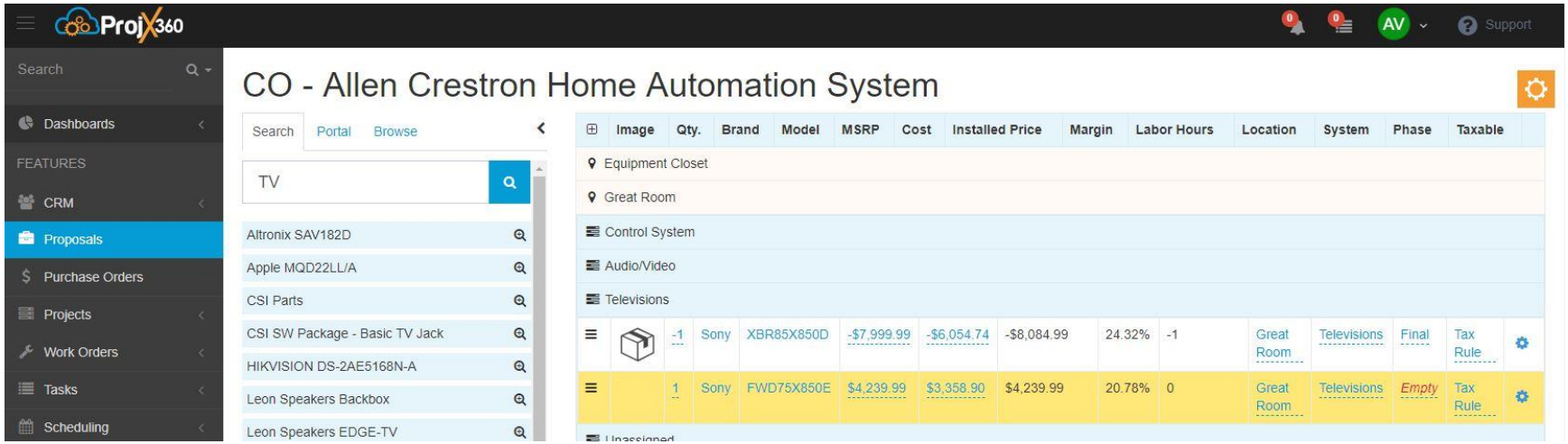
A pop up prompt will ask if you are finished adding products and packages to your change order. If you are done click Open Change Order. If there are additional products to be added choose Return to Proposal.



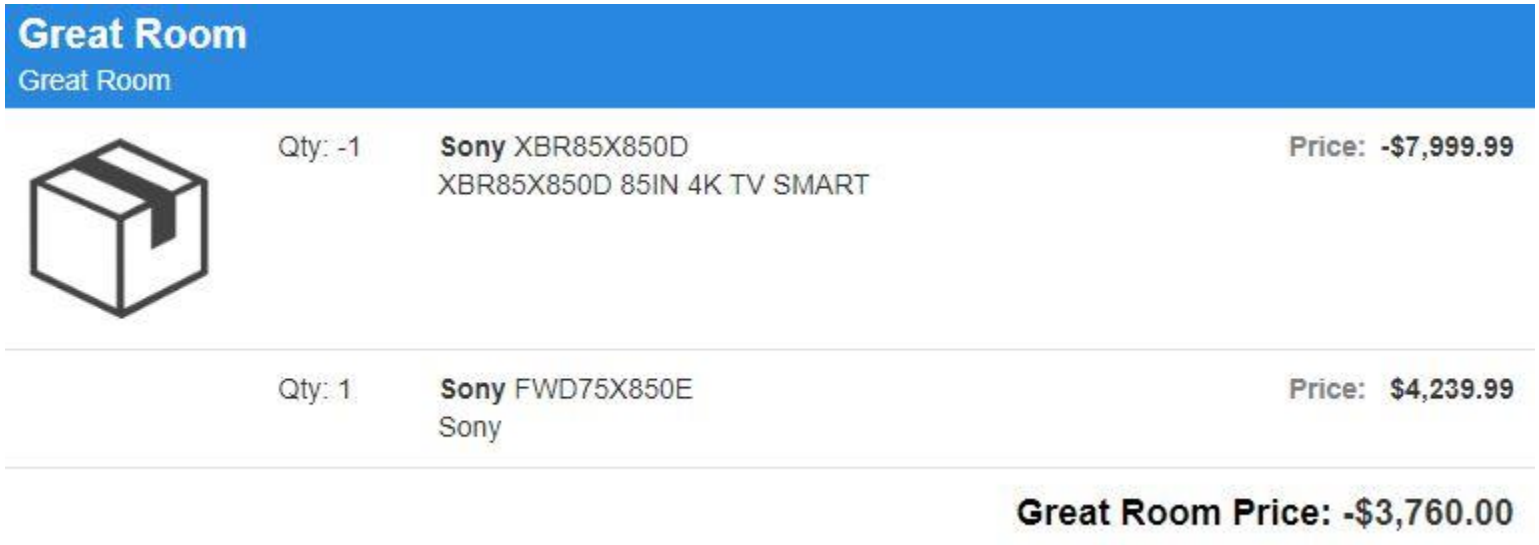
The next screen will return you to the “Proposal Info” overview tab. Make adjustments as needed. Click the Orange Cogwheel, Build Proposal.



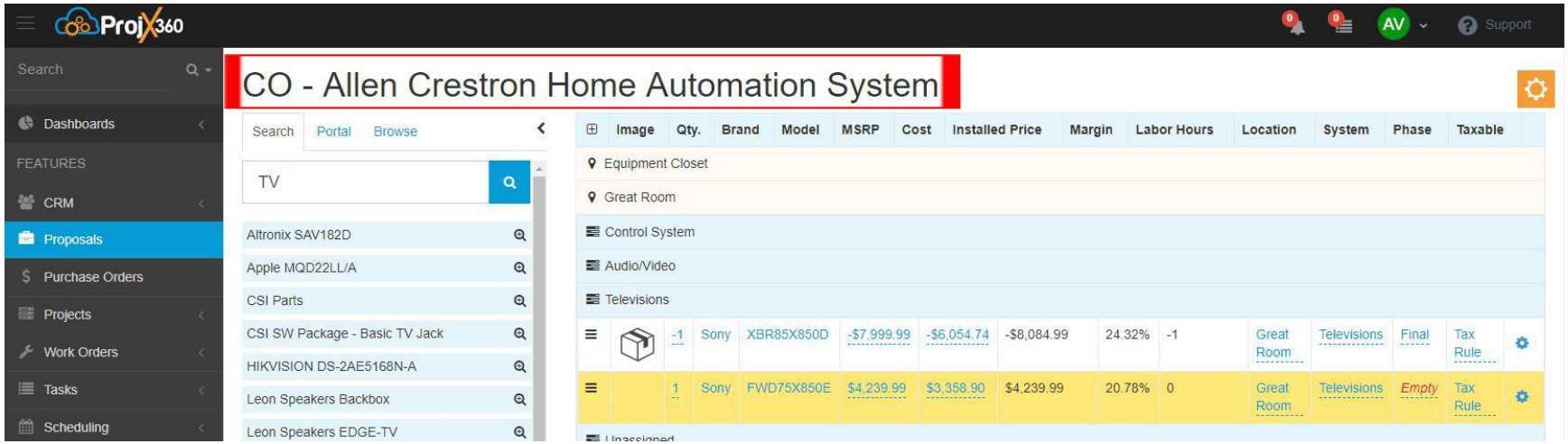
Expand the Location/System and adjust the product you are removing to a Qty -1 and drag and drop your new product into the proposal builder.



Once you generate your proposal the new totals will be reflected.

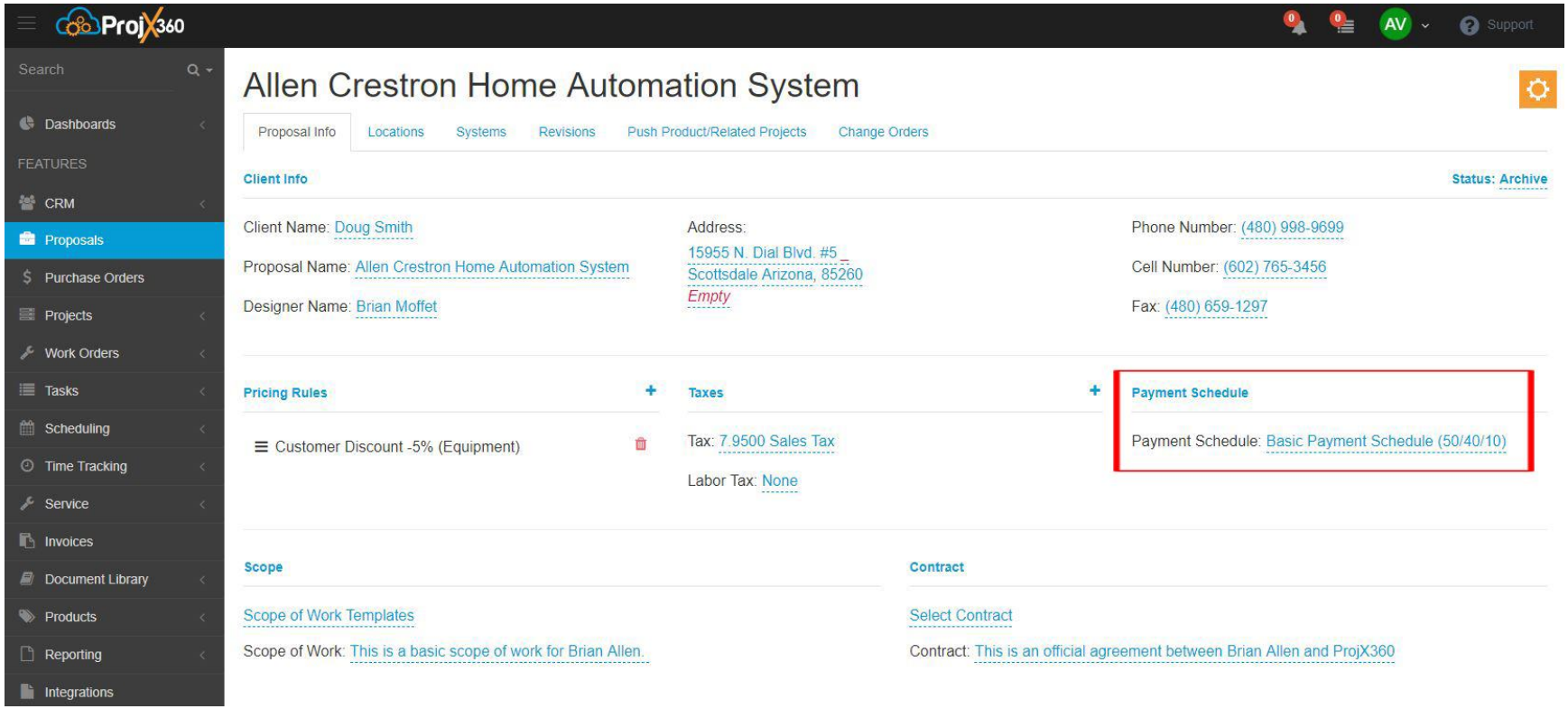


If you need to approve Revisions, Push Product/Related Projects click on the CO title shown below to go back to the main Proposal Info. screen.

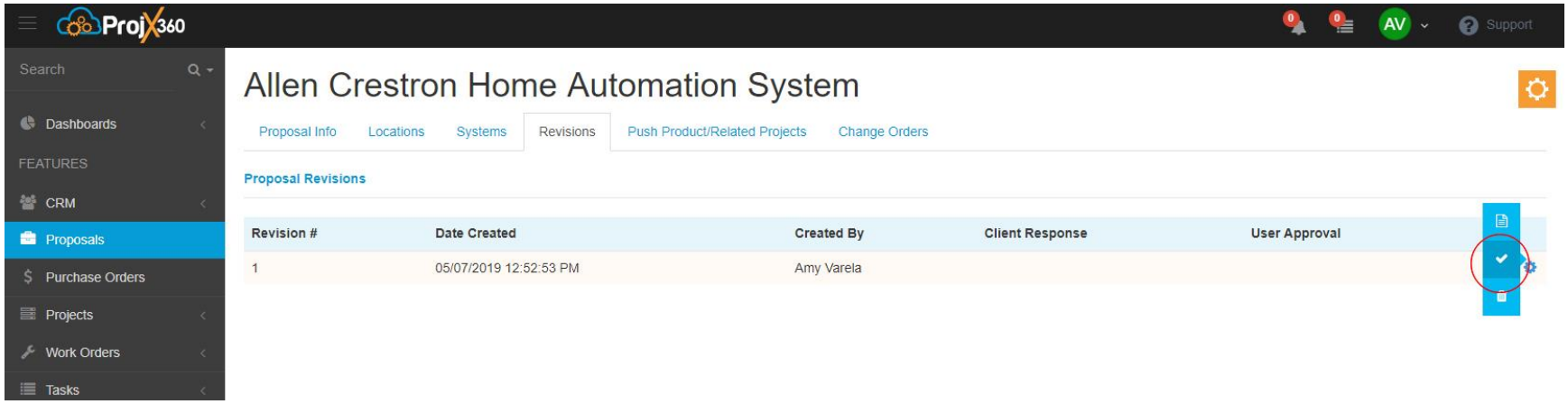


Progressive Invoicing

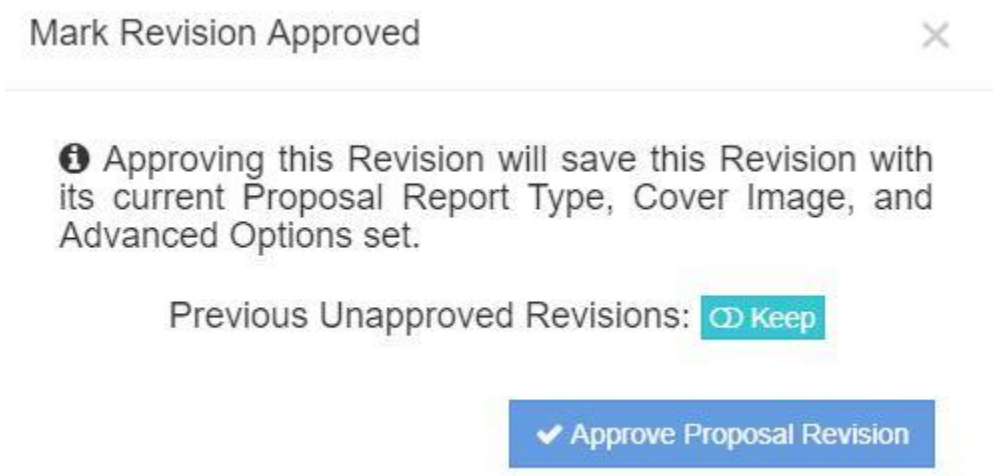
Under the “Proposal Info” tab verify that you have a payment scheduled selected.



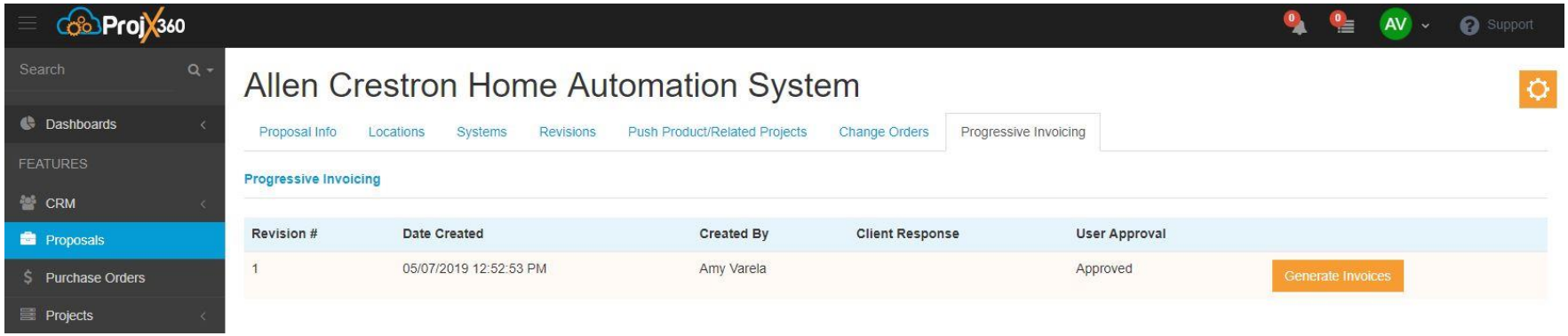
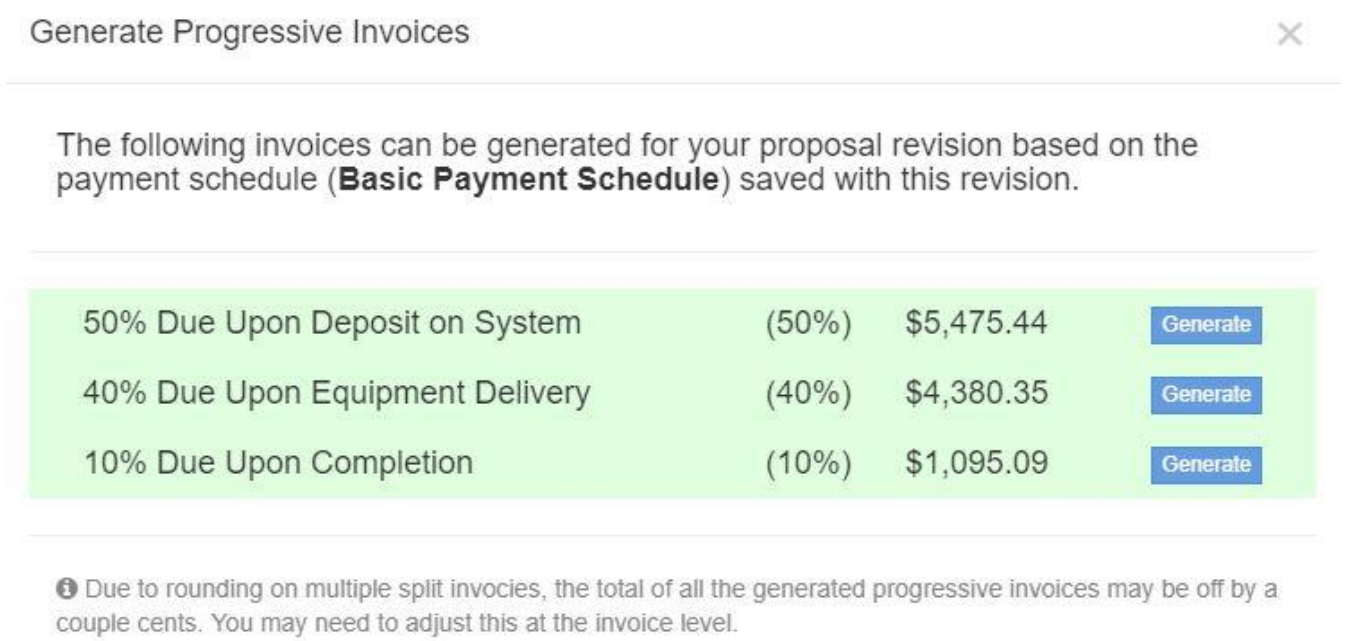
Click on the “Revisions” tab. If you generate a Proposal revision you will see your revision listed like the example below. Click the blue cogwheel on the revision you want to progressive invoice for. Once the cogwheel is expanded click on the check mark to approve.



You will get a pop up box for “Mark Revision Approved”. Click the “Delete” button to “Keep” if you choose to keep your previous revisions. If you want to delete don’t click the Delete button to change to Keep.



Once you click Approve Proposal Revision a new tab will pop up labeled “Progressive Invoicing”. Make sure to create a project or associate the proposal with a project before creating a progressive invoice so those invoices show up in the project overview page.



Click Generate Invoices to see the invoices based off of the selected payment schedule.