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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](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>

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.

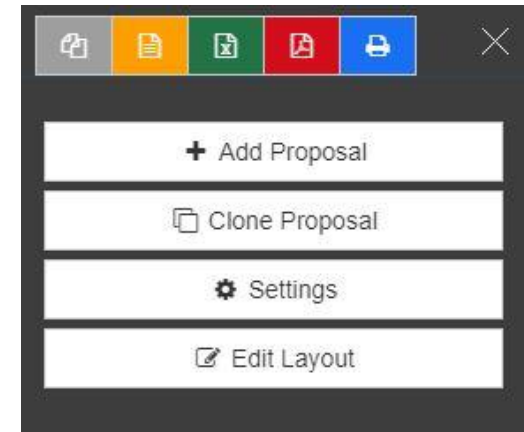
Already have the items stocked locally or from a specialized vendor? No problem, you can also manually create one off PO's in ProjX360, track when they are opened by the supplier and get updates from them as the order process through their system and they update with our single point vendor access.

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.

**Proposals**

All Opened Signed/Completed Archive

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
Allen - Home Theater System	Doug Smith	Select Status	Doug Greenwald	05/14/2018 13:30:44
Allen - Home Theater System - Webinar 11.6.18	Doug Smith	Signed/Completed	Doug Greenwald	11/08/2018 06:33:04
Allen - Home Theater System - Webinar 11.6.18	Doug Smith	Select Status	Doug Greenwald	11/08/2018 06:32:27
Allen CCTV System	Doug Smith	Archive	Doug Greenwald	07/26/2018 10:04:57
Allen Control 4 System	Doug Smith	Archive	Doug Greenwald	08/01/2018 10:08:28
Allen Crestron	Ace Cunningham	Archive	Brian Moffet	09/07/2018 10:34:41
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	05/14/2018 13:30:44
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	05/14/2018 13:30:44
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	05/14/2018 13:30:44
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	05/14/2018 13:30:44
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	05/14/2018 13:30:44
Allen Crestron Home Automation System	Doug Smith	Archive	Brian Moffet	12/14/2018 14:53:39

Showing 1 to 15 of 501 entries

Show 15 entries

Previous 1 2 3 4 5 ... 34 Next

ProjX360

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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. Click the trash can icon to delete any pricing rules you are not using.

### Proposal Settings



Pricing Rules

Locations

Systems

Payment Schedules

Contracts

Scope of Work

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

Systems

Payment Schedules

Contracts

Scope of Work

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]	

## 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)

The screenshot shows the ProjX360 Proposals dashboard. The left sidebar contains a search bar and a list of features: Dashboards, CRM, Proposals (selected), Purchase Orders, Projects, Work Orders, Tasks, Scheduling, Time Tracking, Service, Invoices, Document Library, Products, Reporting, Integrations, Settings, Announcements, and Log Out. The main content area is titled 'Proposals' and has tabs for All, Opened, Signed/Completed, and Archive. Below the tabs is a list of proposal entries with columns for Proposal Name, Client Name, Status, Designer, Last Updated, and Imported. An 'Edit Layout' modal is open in the center, showing a list of columns that can be dragged and dropped to reorder or toggled to show/hide. The columns are: Proposal Name, Client Name, Status, Designer, Last Updated, Imported, Street 1, Street 2, City, State, Post Code, Country, and Builder Link. A 'Show 15 entries' dropdown is at the bottom left of the modal. On the right side of the dashboard, there is a table with columns for Designer, Last Updated, and a third column. A context menu is open over the table, showing options: Add Proposal, Clone Proposal, Settings, and Edit Layout. The bottom right of the dashboard has a pagination bar with 'Previous', '1', '2', '3', '4', '5', '...', '36', and 'Next'.

Designer	Last Updated	
Doug Greenwald	04/16/2019	
Doug Greenwald	03/05/2019	
Doug Greenwald	04/17/2019	
Doug Greenwald	04/01/2019 08:02:55	No
Doug Greenwald	03/25/2019 08:25:45	No
Doug Greenwald	11/14/2018 10:06:02	No
Doug Greenwald	12/14/2018 14:24:51	No
Doug Greenwald	01/08/2019 16:51:20	No
Doug Greenwald	05/14/2018 13:30:44	No
Doug Greenwald	11/08/2018 06:33:04	No
Doug Greenwald	11/08/2018 06:32:27	No
Doug Greenwald	07/26/2018 10:04:57	No
Doug Greenwald	08/01/2018 10:08:28	No
Brian Moffet	09/07/2018 10:34:41	No
Brian Moffet	05/14/2018 13:30:44	No

## Add Proposal

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

The screenshot shows the ProjX360 web application interface. The left sidebar contains a menu with items: Search, Dashboards, FEATURES, CRM, Proposals (highlighted), Purchase Orders, Projects, Work Orders, Tasks, Scheduling, Time Tracking, Service, Invoices, Document Library, Products, Reporting, Integrations, Settings, Announcements, and Log Out. The main content area is titled 'UNDEFINED' and has a sub-header with tabs: Proposal Info (selected), Locations, Systems, Revisions, Push Product/Related Projects, and Change Orders. The 'Client Info' section includes fields for Client Name, Address, Phone Number, Proposal Name, Cell Number, Designer Name, and Fax. The 'Pricing Rules' section has a '+' icon. The 'Taxes' section includes fields for Tax and Labor Tax. The 'Payment Schedule' section has a '+' icon and a field for Payment Schedule. The 'Scope' section includes a field for Scope of Work. The 'Contract' section includes a field for Contract. The 'Status' field is set to 'Select Status'.

**Client Info** Status: Select Status

Client Name: Empty Address: Empty Phone Number: Empty  
Proposal Name: UNDEFINED Empty Empty Empty, Empty Cell Number: Empty  
Designer Name: Empty Empty Fax: Empty

**Pricing Rules** + **Taxes** + **Payment Schedule**

Tax: None Payment Schedule: ()  
Labor Tax: None

**Scope** **Contract**

Scope of Work Templates Select Contract  
Scope of Work: Empty Contract: Empty

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.

View Deal

ABC - Global Test 12.3.18

Deal Details

Amount: \$50,000.00

Expected Close: 12/31/2018

Age: 135 days

Company: ABC Company

Person: Brian Jackson

Sales Person: Doug Greenwald

Address: 2346 E. Bell Rd., 2 2 Phoenix AZ 85006 Empty

Status: Warm

Stage: Presentation 03/03/2019

Source: Referral

Added: 12/03/2018 13:55:17

Potential to Close: 10% / \$5,000.00

Invoiced: \$0.00

Balance: \$50,000.00

Updated: 04/03/2019 13:51:55

Summary

Custom Fields

Project Type New Construction

Contact Empty

Notes (0)

Create Proposal

Create Project

Attached Files (0)

+ Add

Show 10 entries Search...

Filename Added

No matching records found

Showing 0 to 0 of 0 entries

Previous Next

Tasks

Scheduling

Time Tracking

Service

Back Yard Audio System

Allen - Back Yard Audio System

Allen -

05:27:20

05:27:20

07/10/2018 12:18:07

08/08/2018 05:49:31

01/24/2018

04/08/2019

07/10/2018

04/08/2019

Greenwald

Doug Greenwald

ABC

Doug

Design

Presentation Referral Warm

Lost JM Wall Warm

7/31/2018

2/28/2018

Brian Davis

Dave Hair

## 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.

[Proposal Info](#) [Locations](#) [Systems](#) [Revisions](#) [Push Product/Related Projects](#) [Change Orders](#)






**Locations**

Select all locations to be added to this Proposal.

**Select Locations**

- Board Room
- Conference Room
- Covered Patio
- Equipment Closet
- Great Room
- Guest House Living
- IT Closet
- Kitchen
- Master Bathroom
- Pool
- Study
- Training Room
- Upper Level - Master Bedroom

**Attached Locations**

- Dining Room 
- Living Room 
- Kid's Room 
- Family Room 
- Master Bedroom 

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.

### Proposal Location



Location Name: UNDEFINED

Abbreviation: Empty

Description:

Empty





## 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.

Proposal Info Locations **Systems** Revisions Push Product/Related Projects Change Orders Progressive Invoicing

**Systems** +

Select all systems for this Proposal

Select Systems

Search Systems

- Lighting Control
- Security System
- Small Conference Room
- Structure Wire

Attached Systems

Search Attached Systems

- Control System
- Audio/Video
- Televisions

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.

Proposal System X

System: UNDEFINED Abbreviation: Empty

Description: Empty

## 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.

### Allen Home Theater System



[Proposal Info](#) [Locations](#) [Systems](#) [Revisions](#) [Push Product/Related Projects](#) [Change Orders](#)

#### Proposal Revisions

Revision #	Date Created	Created By	Client Response	User Approval
1	03/26/2019 11:17:13 AM	Brian Moffet	Approved 03/26/2019 11:18:12 AM	

## 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”.

### Allen Home Theater System



[Proposal Info](#) [Locations](#) [Systems](#) [Revisions](#) [Push Product/Related Projects](#) [Change Orders](#)

#### Push Product/Related Projects



Project Name	Project Manager	Designer
--------------	-----------------	----------

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

Relate Projects



Project List

Select Project



☐ Show All Projects (Shows completed projects as well as active projects)



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.

Push Products To Project

✓

Filter By Phase

✕

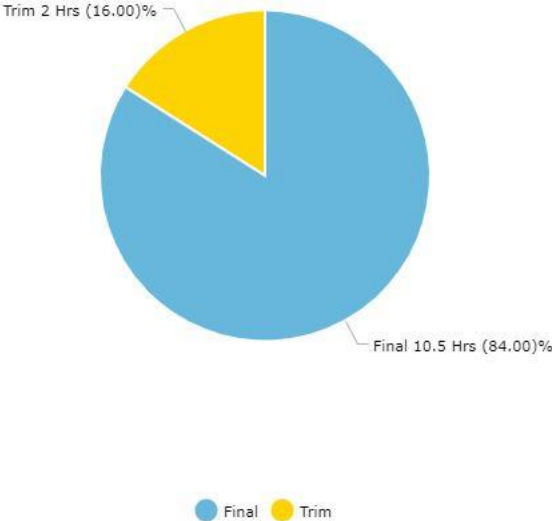
ALLEN HOME THEATER SYSTEM					
Brand	Model Number	System	Phase	Quantity	Status
<div> <div>■</div> <div>EQUIPMENT CLOSET</div> <div>▼</div> </div>					
<div> <div>■</div> <div>Crestron</div> </div>	DM-NVX-351C	Control System	Final	1	
<div> <div>■</div> <div>FAMILY ROOM</div> <div>▼</div> </div>					
<div> <div>■</div> <div>Sony</div> </div>	XBR75X850D	Televisions	Final	1	
<div> <div>■</div> <div>Sanus</div> </div>	LL22	Televisions	Final	1	
<div> <div>■</div> <div>MASTER BEDROOM</div> <div>▼</div> </div>					
<div> <div>■</div> <div>Integra</div> </div>	DRX 3.1	Audio/Video	Final	1	
<div> <div>■</div> <div>Leon</div> </div>	H233LX	Audio/Video	Final	1	
<div> <div>■</div> <div>Leon Speakers</div> </div>	H2MMB-UT	Audio/Video	Trim	1	
<div> <div>■</div> <div>Sonance</div> </div>	VP82R	Audio/Video	Trim	2	
<div> <div>■</div> <div>Paradigm</div> </div>	Monitor Sub 10 Black 230v	Audio/Video	Final	1	
<div> <div>■</div> <div>Crestron</div> </div>	HR-310	Audio/Video	Final	1	

➤ 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.



Labor Break Out



☒ 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.

The screenshot shows the Proj360 web application interface. The top navigation bar includes the Proj360 logo, user profile 'AV', and a 'Support' link. The left sidebar contains a search bar and a list of features: Dashboards, CRM, Proposals (highlighted), and Purchase Orders. The main content area is titled 'Allen Crestron Home Automation System' and has tabs for Proposal Info, Locations, Systems, Revisions, Push Product/Related Projects, and Change Orders (selected). Below the tabs, the 'Change Orders' section displays a table with two columns: 'Change Order Name' and 'Created/Updated'. The table contains one entry: 'CO - Allen Crestron Home Automation System' with a creation date of '05/07/2019'. An orange cogwheel icon is visible in the top right corner of the main content area.

Change Order Name	Created/Updated
CO - Allen Crestron Home Automation System	05/07/2019

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

The screenshot shows a dark-themed menu with a close button (X) in the top right corner. The menu contains seven options, each with an icon and text: 'Build Proposal' (calculator icon), 'Calculate Proposal' (spreadsheet icon), 'Generate Proposal' (document icon), 'Clone Proposal' (copy icon), 'Manage Purchase Orders' (dollar sign icon), 'Purchase Order Status' (info icon), and 'Create Project' (circular arrow icon).

- Build Proposal
- Calculate Proposal
- Generate Proposal
- Clone Proposal
- Manage Purchase Orders
- Purchase Order Status
- Create Project

## 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.

### Allen Home Theater System



Search

Portal

Browse

<

Product Search

Q

Image	Qty.	Brand	Model	MSRP	Cost	Margin	Installed Price	Labor Hours	System	Location	Phase	Taxable	Item Name	Category
Equipment Closet														
Family Room														
Master Bedroom														
Unassigned														

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.

Search

Q

Dashboards

FEATURES

CRM

Proposals

Purchase Orders

Projects

Work Orders

Tasks

Scheduling

Time Tracking

Service

Invoices

Document Library

Products

Reporting

Search

Portal

Browse

<

Packages

Brand

Categories

Basic 5.1 Surround System

Basic Creston

Basic Creston System

Basic Package

Small Conference Room

Allen Home Theater System

Settings gear icon

Image	Qty.	Brand	Model	MSRP	Cost	Margin	Installed Price	Labor Hours	System	Location	Phase	Taxable	Item Name	Category
Equipment Closet														
Control System														
No Products or Packages have been added yet.														
Audio/Video														
+	1	Basic 5.1 Surround System	Basic 5.1 Surround System	\$6,196.99	\$2,903.45	53.16%	\$7,070.24	10.25	Audio/Video	Equipment Closet	Package	Package		
Televisions														
Unassigned														
Great Room														
Control System														
Audio/Video														
Televisions														
Unassigned														
Study														
Unassigned														

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%	<b>Proposal Total:</b>	<b>\$19,262.18</b>
Total w/Tax (7.9500%):	\$18,178.44	Total w/Labor Tax (%):	\$2,422.50	<b>Proposal Total w/Tax:</b>	<b>\$20,600.94</b>

Location	Equip. Cost	Equip. MSRP	Margin	Markup	Labor Cost	Labor Price	Labor Margin
<b>— Equipment Closet Totals</b>	<b>\$3,023.45</b>	<b>\$6,428.99</b>	<b>52.97%</b>	<b>112.64%</b>	<b>\$490.00</b>	<b>\$1,041.25</b>	<b>52.94%</b>
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%
<b>+ Great Room Totals</b>	<b>\$985.95</b>	<b>\$4,698.00</b>	<b>79.01%</b>	<b>376.49%</b>	<b>\$120.00</b>	<b>\$255.00</b>	<b>52.94%</b>
<b>+ Study Totals</b>	<b>\$3,103.45</b>	<b>\$6,598.99</b>	<b>52.97%</b>	<b>112.63%</b>	<b>\$530.00</b>	<b>\$1,126.25</b>	<b>52.94%</b>
<b>+ Unassigned Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>Cannot Calculate</b>	<b>Cannot Calculate</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>Cannot Calculate</b>

## Generate Proposal

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

Generate Proposal Document

View Only

Select Document Type

+ Advanced Options

Display Systems

Report Color Scheme

Select a Cover Page Image

Email Link

Preview Link

Download Proposal Document

**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.

Advanced Options ×

**Product Display**

<input type="checkbox"/> Show Location / System Description	<input type="checkbox"/> Display Images?
<input type="checkbox"/> Show Manufacturer?	<input type="checkbox"/> Show Model Number?
<input type="checkbox"/> Show Long Description instead of Short	<input type="checkbox"/> Show item prices?
<input type="checkbox"/> Summarize Accessories?	<input type="checkbox"/> Summarize Packages
<input type="checkbox"/> Show Labor hours for Labor items in report?	<input type="checkbox"/> Show Labor Rate in Report?
<input type="checkbox"/> Show Per Line Tax?	<input type="checkbox"/> Show Product/Labor Taxes Separately?
<input type="checkbox"/> Show Per Line Discount/Surcharge?	<input type="checkbox"/> Show Installed Price?
<input type="checkbox"/> Show Dynamic group section totals?	<input type="checkbox"/> Show Dynamic Group Product Tax?
<input type="checkbox"/> Show Dynamic Group Labor Tax?	<input type="checkbox"/> Show Dynamic Group Total Tax?
<input type="checkbox"/> Show Dynamic Group Discount/Surcharge?	<input type="checkbox"/> Show Dynamic Group Installed Price?
<input type="checkbox"/> Show Systems in Location?	

**Project Summary**

<input type="checkbox"/> Hide project summary section?	<input type="checkbox"/> Show Equipment Charge?
<input type="checkbox"/> Show product charge per Phase?	<input type="checkbox"/> Show Labor Charge?
<input type="checkbox"/> Show labor charge per Phase?	<input type="checkbox"/> Display Taxes Separately?
<input type="checkbox"/> Show Discount / Surcharge ?	<input type="checkbox"/> Show Payment Schedule?

**Report Elements**

<input type="checkbox"/> Hide Header in report?	<input type="checkbox"/> Hide cover page?
<input type="checkbox"/> Hide Scope of Work?	<input type="checkbox"/> Hide Contract?

All Report Types

This Report Type

✓ This Report Only

## Product Display

Show Location / System Description

### Equipment Closet

#### Equipment Closet Description



Qty: 1

#### Basic 5.1 Surround System

5.1 surround system

Price: \$6,198.99

**Equipment Closet Price: \$6,198.99**

Show Manufacturer?

### 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 Long Description instead of Short

Great Room			
Audio/Video			
Audio/Video Distribution			
	Qty: 2	<b>Sonance VP82R</b> Sonance VP82R Visual Performance 8 & In-Ceiling Speakers Total Labor: \$85.00 Total Labor Hours: 1	<b>Price: \$1,700.00</b> <b>Equip. Tax: \$128.39</b> <b>Labor Tax: \$3.83</b> <b>Total Tax: \$132.22</b> <b>Surcharge: -\$85.00</b> <b>Installed: \$1,832.22</b>

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

Televisions			
Televisions			
	Qty: 1	<b>Sony XBR75X850D</b> ** Accessories included ** Sony XBR-75X850D Total Labor: \$170.00 Total Labor Hours: 2	<b>Price: \$2,998.00</b> <b>Equip. Tax: \$226.42</b> <b>Labor Tax: \$7.65</b> <b>Total Tax: \$234.07</b> <b>Surcharge: -\$149.90</b> <b>Installed: \$3,252.17</b>

Show Labor Hours for Labor items in report?

Great Room				
Audio/Video				
Audio/Video Distribution				
	Qty: 2	<b>Sonance</b> VP82R	Price:	\$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling	Equip. Tax:	\$128.39
		Speakers	Labor Tax:	\$3.83
		Total Labor: \$85.00	Total Tax:	\$132.22
		Total Labor Hours: 1	Surcharge:	-\$85.00
			Installed:	\$1,832.22

Show Per Line Tax?

Great Room				
Audio/Video				
Audio/Video Distribution				
	Qty: 2	<b>Sonance</b> VP82R	Price:	\$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling	Equip. Tax:	\$128.39
		Speakers	Labor Tax:	\$3.83
		Total Labor: \$85.00	Total Tax:	\$132.22
		Total Labor Hours: 1	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	<b>Sonance</b> VP82R	Price: \$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling	Equip. Tax: \$128.39
		Speakers	Labor Tax: \$3.83
		Total Labor: \$85.00	Total Tax: \$132.22
		Total Labor Hours: 1	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	<b>Sonance</b> VP82R	Price: \$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling	Equip. Tax: \$128.39
		Speakers	Labor Tax: \$3.83
		Total Labor: \$85.00	Total Tax: \$132.22
		Total Labor Hours: 1	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	<b>Sonance</b> <b>VP82R</b>	<b>Price:</b> \$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling	<b>Equip. Tax:</b> \$128.39
		Speakers	<b>Labor Tax:</b> \$3.83
		Total Labor: \$85.00	<b>Total Tax:</b> \$132.22
		Total Labor Hours: 1	<b>Surcharge:</b> -\$85.00
			<b>Installed:</b> \$1,832.22

Show item prices?


Great Room			
Audio/Video			
Audio/Video Distribution			
	Qty: 2	<b>Sonance</b> VP82R	<b>Price:</b> \$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling	<b>Equip. Tax:</b> \$128.39
		Speakers	<b>Labor Tax:</b> \$3.83
		Total Labor: \$85.00	<b>Total Tax:</b> \$132.22
		Total Labor Hours: 1	<b>Surcharge:</b> -\$85.00
			<b>Installed:</b> \$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	<b>Basic 5.1 Surround System</b>	Price: \$6,198.99
		5.1 surround system	Equip. Tax: \$468.18
		Total Labor: \$871.25	Labor Tax: \$39.21
		Total Labor Hours: 10.25	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	<b>Sonance VP82R</b>	Price: \$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling Speakers	Equip. Tax: \$128.39
		Total Labor: \$85.00	Labor Tax: \$3.83
		Total Labor Hours: 1	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	<b>Sonance</b> 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	<b>Sonance</b> 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	<b>Sonance</b> VP82R	Price: \$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling	Equip. Tax: \$128.39
		Speakers	Labor Tax: \$3.83
		Total Labor: \$85.00	Total Tax: \$132.22
		Total Labor Hours: 1	Surcharge: -\$85.00
			Installed: \$1,832.22
<hr/>			
			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	<b>Sonance</b> VP82R	Price: \$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling	Equip. Tax: \$128.39
		Speakers	Labor Tax: \$3.83
		Total Labor: \$85.00	Total Tax: \$132.22
		Total Labor Hours: 1	Surcharge: -\$85.00
			Installed: \$1,832.22
<hr/>			
			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	<b>Sonance</b> VP82R	Price: \$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling	Equip. Tax: \$128.39
		Speakers	Labor Tax: \$3.83
		Total Labor: \$85.00	Total Tax: \$132.22
		Total Labor Hours: 1	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:			<u><del>-\$85.00</del></u>
Audio/Video Installed Total:			\$1,832.22

Show System totals per Location?

Great Room			
Audio/Video			
Audio/Video Distribution			
	Qty: 2	<b>Sonance</b> VP82R	Price: \$1,700.00
		Sonance VP82R Visual Performance 8 & In-Ceiling	Equip. Tax: \$128.39
		Speakers	Labor Tax: \$3.83
		Total Labor: \$85.00	Total Tax: \$132.22
		Total Labor Hours: 1	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:	<b>\$12,125.98</b>
Trim Phase Equipment:	<b>\$5,370.00</b>
Labor:	<b>\$2,252.50</b>
Customer Discount:	<b>(\$874.80)</b>
Equipment Taxes:	<b>\$1,321.38</b>
Labor Taxes:	<b>\$101.36</b>
Grand Total:	<b>\$20,296.43</b>

Show Payment Schedule?

## Payment Schedule

50% Due Upon Deposit on System:	<b>\$10,148.21</b>
40% Due Upon Equipment Delivery :	<b>\$8,118.57</b>
10% Due Upon Completion :	<b>\$2,029.64</b>



## Report Elements

Hide Header in report



Hide Scope of Work

## 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. Donec ullamcorper odio et libero blandit pellentesque. Suspendisse et sem quis magna hendrerit varius. Maecenas ornare bibendum nisl nec tempus. Vestibulum sed felis feugiat, porta est in, tincidunt ipsum. Pellentesque lacinia magna at leo lobortis fermentum. Vivamus pellentesque lorem tellus, ut auctor est dapibus in. Fusce ullamcorper erat nec facilisis fermentum. Vestibulum ornare lectus id elit gravida tincidunt.

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?

## Contract

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. Donec ullamcorper odio et libero blandit pellentesque. Suspendisse et sem quis magna hendrerit varius. Maecenas ornare bibendum nisl nec tempus. Vestibulum sed felis feugiat, porta est in, tincidunt ipsum. Pellentesque lacinia magna at leo lobortis fermentum. Vivamus pellentesque lorem tellus, ut auctor est dapibus in. Fusce ullamcorper erat nec facilisis fermentum. Vestibulum ornare lectus id elit gravida tincidunt.

**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”.

**Formatting Tips!** 

Change font size of "Proposal Name" temporarily for printability.

Font Size ▼ ▲

Show/Hide Elements 

 Proposal Name

 Client Info

 Cover Image

 Presented By



ProjX360 Proposal

Date: 04/18/2019

4/18/2019

ProjX360 Allen Home Theater System Proposal Document [DOCUMENT]



ProjX360 Proposal

Date: 04/18/2019

## 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).

The screenshot shows the Proj360 web application interface. On the left is a dark sidebar menu with options like Dashboards, CRM, Proposals, Purchase Orders, Projects, Work Orders, Tasks, Scheduling, Time Tracking, Service, Invoices, Document Library, Products, Reporting, Integrations, Settings, Announcements, and Log Out. The 'Proposals' menu item is highlighted. The main content area is titled 'Proposals' and contains a table of proposals. A modal window titled 'Clone Proposal' is open in the center, allowing a user to select a proposal to clone, enter a new proposal name, and choose which data fields to clone. The modal has a close button (X) in the top right and a confirmation button (checkmark) in the bottom right. The background table lists proposals with columns for Proposal Name, Client Name, Status, Designer, and Last Updated. A floating toolbar on the right side of the table includes buttons for Add Proposal, Clone Proposal, Settings, and Edit Layout.

Proposal Name	Client Name	Status	Designer	Last Updated
ABC - Global Test 12.3.18				04/16/2019
ABC Builder - Test Lott #24 3.5.19			Doug Greenwald	03/05/2019
ABC Builder - Test Lott #24 3.5.19				04/17/2019
ABC Company - Test Project 3 12.19			Doug Greenwald	04/01/2019 08:02:55
ABC Company Doe Lot 235 crestron System				03/25/2019 08:25:45
ABC Company Lot 235 Prewire			Doug Greenwald	11/14/2018 10:06:02
Allen - Back Yard Audio System			Doug Greenwald	12/14/2018 14:24:51
Allen - Home Theater System			Doug Greenwald	01/08/2019 16:51:20
Allen - Home Theater System			Doug Greenwald	05/14/2018 13:30:44
Allen - Home Theater System - Webinar 11.6.18			Doug Greenwald	11/08/2018 06:33:04
Allen - Home Theater System - Webinar 11.6.18				11/08/2018 06:32:27
Allen CCTV System			Doug Greenwald	07/26/2018 10:04:57
Allen Control 4 System			Doug Greenwald	08/01/2018 10:08:28
Allen Crestron			Brian Moffet	09/07/2018 10:34:41
Allen Crestron Home Automation System			Brian Moffet	05/14/2018 13:30:44

## 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.

Proj360

Search

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### Allen Crestron Home Automation System

Search Portal Browse

tv

Image	Qty.	Brand	Model	MSRP	Cost	Installed Price	Margin	Labor Hours	Location	System	Phase	Taxable
Equipment Closet												
Great Room												
Control System												
Audio/Video												
Televisions												
	1	Sony	XBR85X850D	\$7,999.99	\$6,054.74	\$8,084.99	24.32%	1	Great Room	Televisions	Final	Ta Ri
Unassigned												

Click the “+” to Add New Change Order.

Change Order

×

Add to an existing Change order or add a new one.

+

Existing Change Order	Created/Updated
i No Change Orders Created.	

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

Add New Change Order

×

i Product to be added to change order: Sony XBR85X850D

CO - Allen Crestron Home Automation System

SCOPE OF WORK

85" TV is to large for space, change to 75" TV.

✓



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.

Add New Change Order

×

Are you finished adding products and packages to your change order?

Open Change Order

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.

The screenshot shows the ProjX360 web application interface. The left sidebar contains a search bar and a list of navigation items: Dashboards, FEATURES, CRM, Proposals (highlighted), Purchase Orders, Projects, Work Orders, Tasks, Scheduling, Time Tracking, Service, Invoices, Document Library, Products, and Reporting. The main content area is titled 'CO - Allen Crestron Home Automation System' and includes a settings cogwheel icon. Below the title are tabs for 'Proposal Info' (selected), 'Revisions', 'Push Product/Related Projects', and 'Back to Parent Proposal'. The 'Client Info' section shows fields for Client Name (Doug Smith), Address (15955 N. Dial Blvd. #5, Scottsdale Arizona, 85260), Phone Number ((602) 765-3456), Cell Number ((480) 998-9699), and Fax (Empty). The 'Pricing Rules' section is empty. The 'Taxes' section shows Tax (7.9500 Sales Tax) and Labor Tax (None). The 'Payment Schedule' section shows Basic Payment Schedule (50/40/10). The 'Scope' section shows Scope of Work Templates and Scope of Work (85" TV is to large for space, change to 75" TV.). The 'Contract' section shows Select Contract and Contract (This is an official agreement between Brian Allen and ProjX360).

ProjX360

Search

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Scheduling

Time Tracking

Service

Invoices

Document Library

Products

Reporting

## CO - Allen Crestron Home Automation System

Proposal Info Revisions Push Product/Related Projects Back to Parent Proposal

Client Info Status: Archive

Client Name: Doug Smith

Address: 15955 N. Dial Blvd. #5  
Scottsdale Arizona, 85260

Phone Number: (602) 765-3456

Cell Number: (480) 998-9699

Fax: Empty

Proposal Name: CO - Allen Crestron Home Automation System

Designer Name: Empty

Pricing Rules + Taxes + Payment Schedule

Tax: 7.9500 Sales Tax

Labor Tax: None

Payment Schedule: Basic Payment Schedule (50/40/10)

Scope Contract

Scope of Work Templates Select Contract

Scope of Work: 85" TV is to large for space, change to 75" TV.

Contract: This is an official agreement between Brian Allen and ProjX360

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.

**CO - Allen Crestron Home Automation System**

Search Portal Browse


TV

Altronix SAV182D  
Apple MQD22LL/A  
CSI Parts  
CSI SW Package - Basic TV Jack  
HIKVISION DS-2AE5168N-A  
Leon Speakers Backbox  
Leon Speakers EDGE-TV

Image	Qty.	Brand	Model	MSRP	Cost	Installed Price	Margin	Labor Hours	Location	System	Phase	Taxable
Equipment Closet												
Great Room												
Control System												
Audio/Video												
Televisions												
	-1	Sony	XBR85X850D	\$7,999.99	\$6,054.74	\$8,084.99	24.32%	-1	Great Room	Televisions	Final	Tax Rule
	1	Sony	FWD75X850E	\$4,239.99	\$3,358.90	\$4,239.99	20.78%	0	Great Room	Televisions	Empty	Tax Rule

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

**Great Room**  
Great Room



Qty: -1    **Sony XBR85X850D**  
XBR85X850D 85IN 4K TV SMART    **Price: -\$7,999.99**

Qty: 1    **Sony FWD75X850E**  
Sony    **Price: \$4,239.99**

**Great Room Price: -\$3,760.00**

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.

**CO - Allen Crestron Home Automation System**

Search Portal Browse

TV

- Altronix SAV182D
- Apple MQD22LL/A
- CSI Parts
- CSI SW Package - Basic TV Jack
- HIKVISION DS-2AE5168N-A
- Leon Speakers Backbox
- Leon Speakers EDGE-TV

Image	Qty.	Brand	Model	MSRP	Cost	Installed Price	Margin	Labor Hours	Location	System	Phase	Taxable
Equipment Closet												
Great Room												
Control System												
Audio/Video												
Televisions												
	-1	Sony	XBR85X850D	<a href="#">-\$7,999.99</a>	<a href="#">-\$6,054.74</a>	<a href="#">-\$8,084.99</a>	24.32%	-1	Great Room	Televisions	Final	Tax Rule
	1	Sony	FWD75X850E	<a href="#">\$4,239.99</a>	<a href="#">\$3,358.90</a>	<a href="#">\$4,239.99</a>	20.78%	0	Great Room	Televisions	Empty	Tax Rule

## Progressive Invoicing

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

The screenshot displays the ProjX360 interface for a proposal titled "Allen Crestron Home Automation System". The left sidebar contains navigation links: Search, Dashboards, FEATURES, CRM, Proposals (highlighted), Purchase Orders, Projects, Work Orders, Tasks, Scheduling, Time Tracking, Service, Invoices, Document Library, Products, Reporting, and Integrations. The top header shows the ProjX360 logo, notification icons, a user profile (AV), and a Support link.

The main content area is divided into tabs: Proposal Info, Locations, Systems, Revisions, Push Product/Related Projects, and Change Orders. The "Proposal Info" tab is active, showing client details and pricing rules.

**Client Info** (Status: Archive)

Client Name: <a href="#">Doug Smith</a>	Address: <a href="#">15955 N. Dial Blvd. #5</a> <a href="#">Scottsdale Arizona, 85260</a>	Phone Number: <a href="#">(480) 998-9699</a>
Proposal Name: <a href="#">Allen Crestron Home Automation System</a>	Designer Name: <a href="#">Brian Moffet</a>	Cell Number: <a href="#">(602) 765-3456</a>
		Fax: <a href="#">(480) 659-1297</a>

**Pricing Rules** (+) **Taxes** (+) **Payment Schedule**

Customer Discount -5% (Equipment)	Tax: <a href="#">7.9500 Sales Tax</a>	Payment Schedule: <a href="#">Basic Payment Schedule (50/40/10)</a>
	Labor Tax: <a href="#">None</a>	

**Scope** **Contract**

Scope of Work Templates	Select Contract
Scope of Work: <a href="#">This is a basic scope of work for Brian Allen.</a>	Contract: <a href="#">This is an official agreement between Brian Allen and ProjX360</a>

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.

Proj360

Allen Crestron Home Automation System

Proposal Info Locations Systems Revisions Push Product/Related Projects Change Orders

Proposal Revisions

Revision #	Date Created	Created By	Client Response	User Approval
1	05/07/2019 12:52:53 PM	Amy Varela		

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.

Mark Revision Approved

Approving this Revision will save this Revision with its current Proposal Report Type, Cover Image, and Advanced Options set.

Previous Unapproved Revisions: Keep

Approve Proposal Revision

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.

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## Allen Crestron Home Automation System

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[Locations](#)
[Systems](#)
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[Change Orders](#)
[Progressive Invoicing](#)

Progressive Invoicing

Revision #	Date Created	Created By	Client Response	User Approval	
1	05/07/2019 12:52:53 PM	Amy Varela		Approved	<a href="#">Generate Invoices</a>

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

Generate Progressive Invoices

The following invoices can be generated for your proposal revision based on the payment schedule (**Basic Payment Schedule**) saved with this revision.

50% Due Upon Deposit on System	(50%)	\$5,475.44	<a href="#">Generate</a>
40% Due Upon Equipment Delivery	(40%)	\$4,380.35	<a href="#">Generate</a>
10% Due Upon Completion	(10%)	\$1,095.09	<a href="#">Generate</a>

**i** Due to rounding on multiple split invocie, the total of all the generated progressive invoices may be off by a couple cents. You may need to adjust this at the invoice level.