Toll Free: 1-844-688-5584
Email: support@projx360.com
Live Chat: https://projx360.com

Sales CRM

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Starting Tips

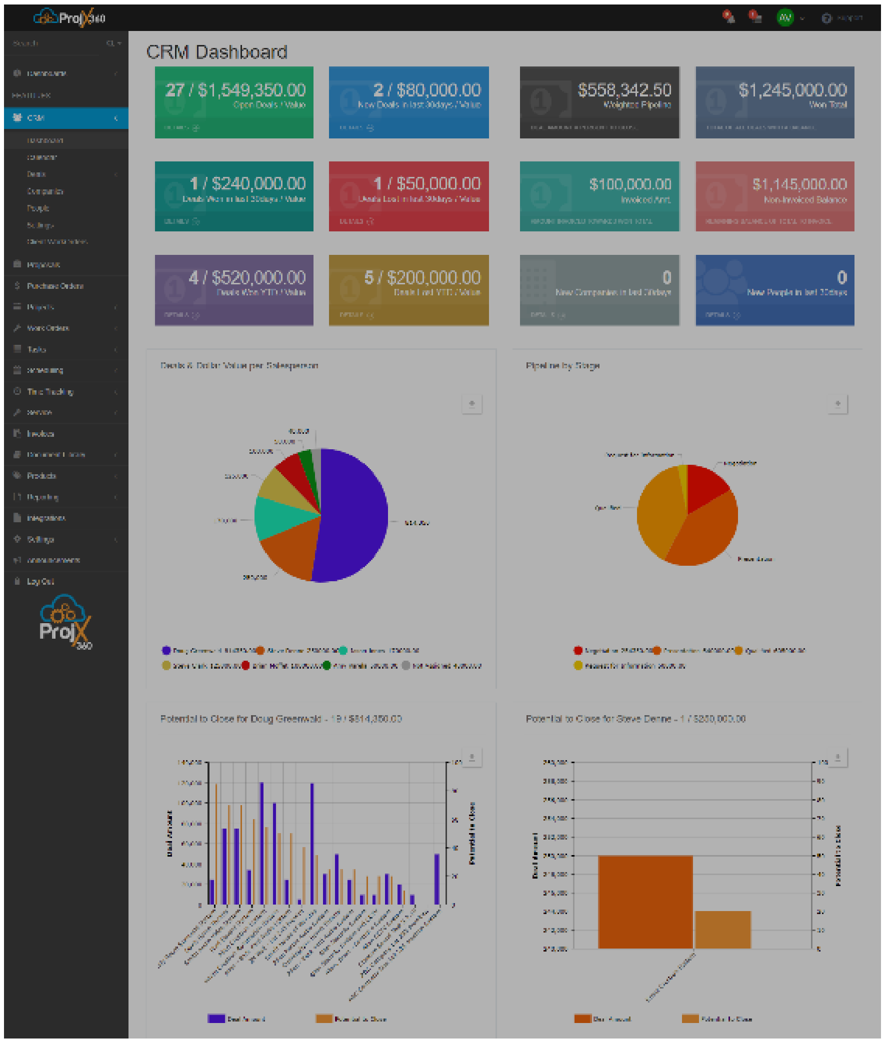
- We can only import clients, companies and products. Attachments are located in your welcome email.
- Client, Company, Proposals, Projects, Work Orders and any area that do not offer a delete option means you can't delete it. We recommend if you want to create test items do so in our free sandbox area. https://projx360.com/demo. Your only option if you have created extra data is to use it for the next record you are adding.
- Recommended Web Browser: Google Chrome. Make sure you are running the latest version.
- App: The ProjX360 Management Solution does not need a specific mobile app as it has been built in responsive design and will format appropriately for your devices browser. We do have an app available for your ProjX360 environment to add additional features to the time tracking and access to your environment without having to log in each time. Search your device store for "ProjX360" to find our free app. If you are having trouble connecting verify you are using the same url as you are on desktop with "https".
- If you need a new license contact support@projx360.com or use live chat on our website projx360.com.
- If you need to remove any of your PM (Project Management) licenses please mark inactive the user you would like to remove. If you are trying to remove a Sales CRM or PR (Proposal) license click on the user who has the CRM/PR license assigned to them and uncheck next to Proposal or CRM License. Please contact support@projx360.com so your billing can be adjusted.
- Billing related: Please call us toll free 1-844-688-5584 or live chat on projx360.com.
- Learning Center: https://projx360.com/help
- Request Online Training by Go To Meeting: https://projx360.com/training-request
- Request On-Site Training: https://projx360.com/support/on-site-training
- Upcoming ProjX360 enhancements: https://projx360.com/road-map
- Request New Feature: https://projx360.com/contact-us

CRM

With ProjX360 Sales CRM you and your team will be able to easily manage and track your entire sales pipeline which will allow you to close more deals efficiently. ProjX360's Sales CRM makes creating and working with deals as easy as possible which allows your team more time to sell. Monitor your deal activity to know exactly where each is in your sales process and what percentage of chance each has to close. Keep track of your team's efforts towards closing a deal and everything else that impacts your sales process. Standardize your sales process with customizable activity templates you create for your team to follow. It's important to know where your best leads come from, with ProjX360's lead management you can tag individual deals with where they came from, so you can see the best channels for your company's sales process. You can also monitor your leads through the sales process with our customizable status tracking. Know where each lead is in that process and make sure it is being moved through properly. ProjX360's Sales CRM reporting provides insight at all times what is in each sales pipeline, the percentage of chance each deal has to close and its value. You can monitor each sales person's performance to know who is producing and who isn't. You will also know which of your marketing efforts are working by knowing where your leads are coming from to make sure you are getting the most out of your marketing dollars. These features and many more will help you streamline your sales process and close more deals, making your company more money.

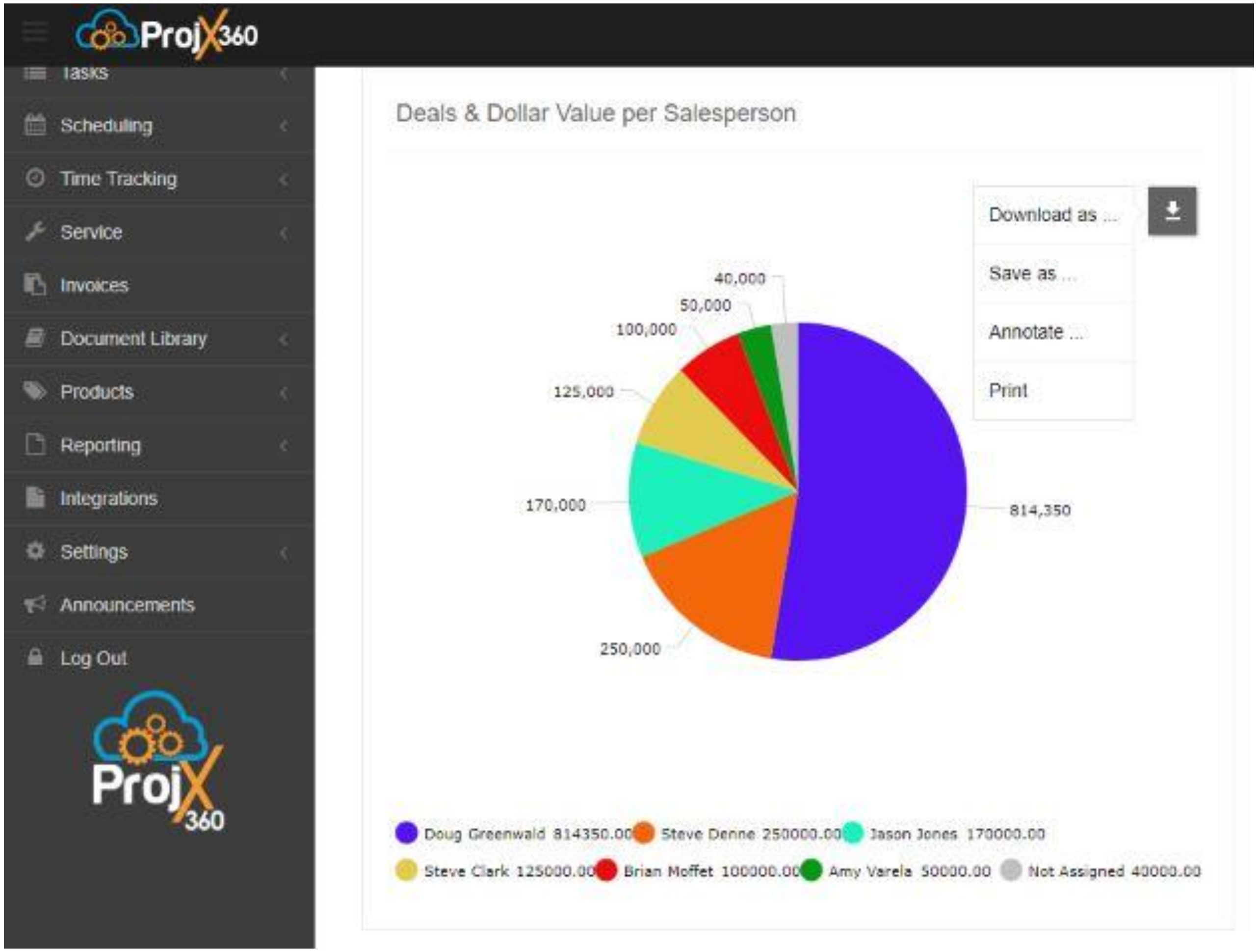
Dashboard

- Overview page that will show you any open, new, won, lost deals etc. Any new companies, people etc.
- Deals & Dollar Value per Salesperson, pipeline by stage and the potential to close per Salesperson is also shown on this dashboard.



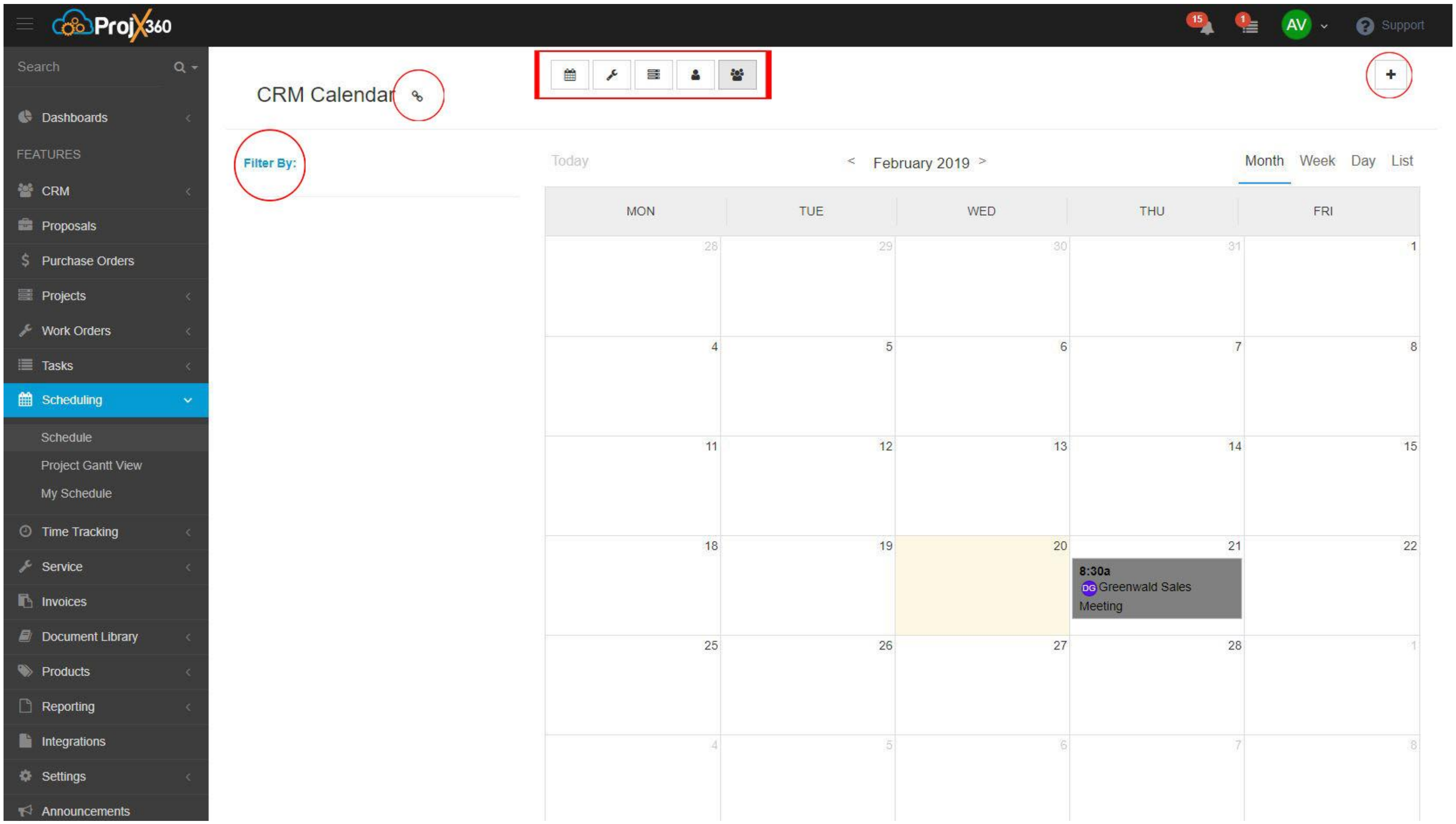
On the charts there is a drop down arrow icon that will allow you to:

- Download as: PNG, JPG, SVG or PDF.
- Save as types: CSV, XLSX, JSON.
- Annotate/Draw

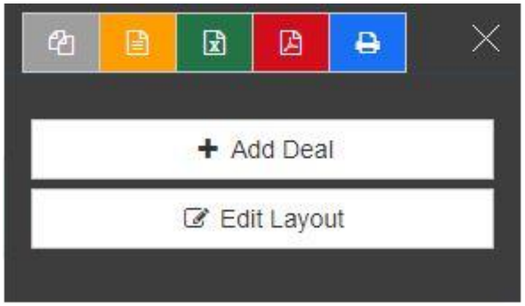


Calendar

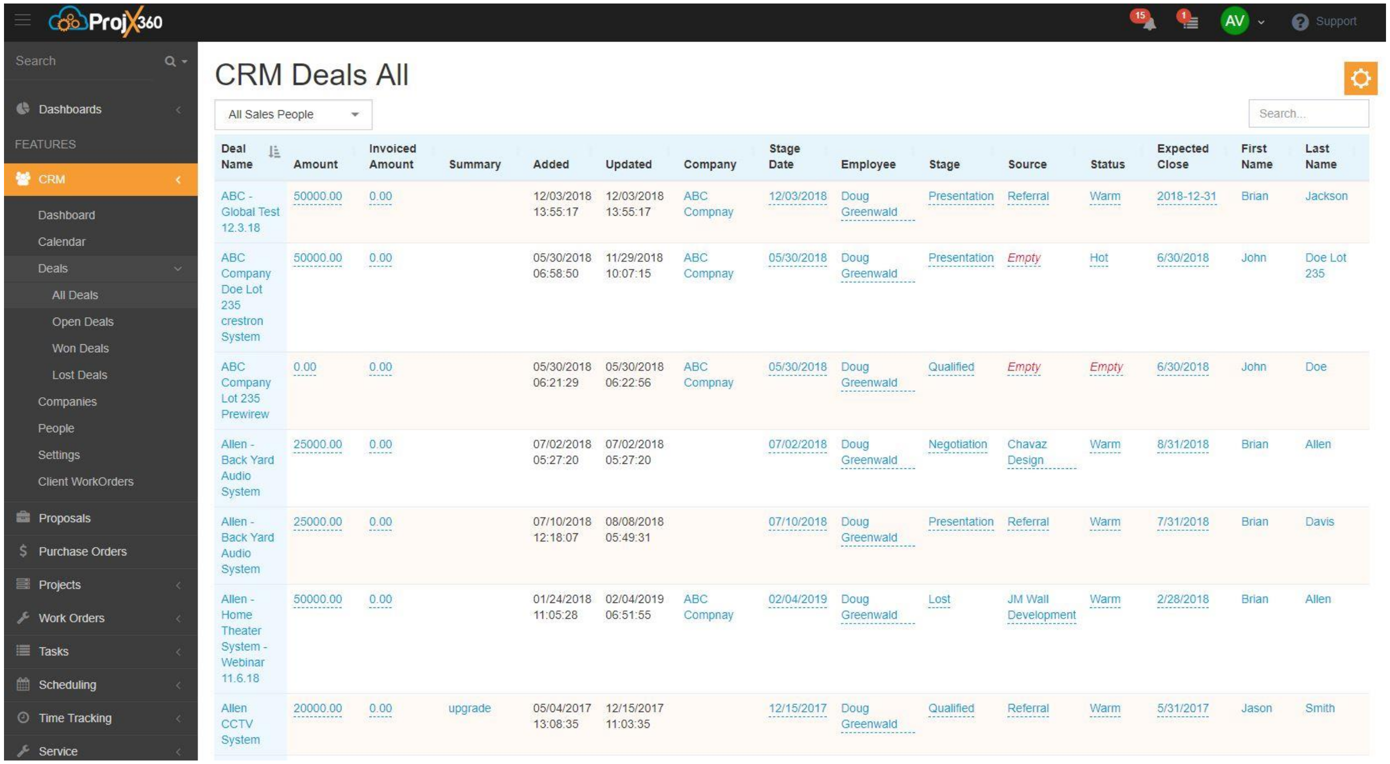
- Click “+” to add new calendar events.
- Toggle between month, week, day or list views.
- Click on any icon along the middle to switch calendars.
- Next to the CRM Calendar Title click the link icon for iCal instructions. The iCal link allows you to subscribe to the calendar on other devices and programs. Instructions are provided for Outlook, Apple and Google.



Deals

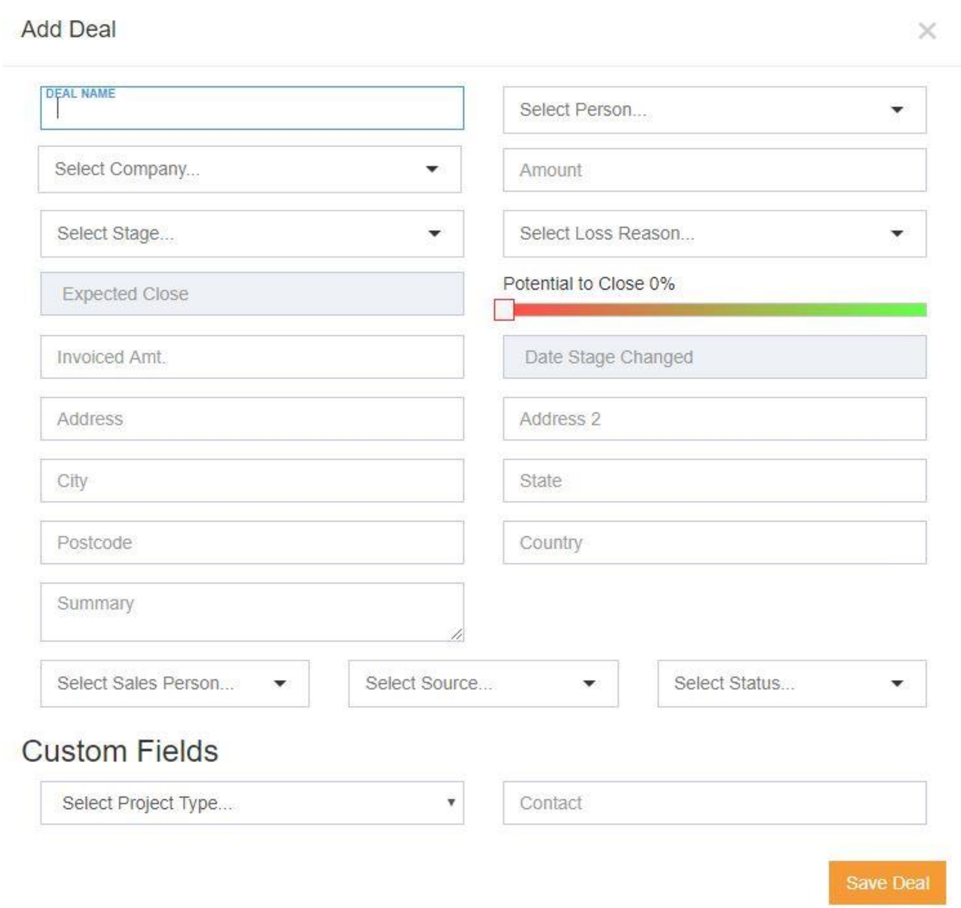


- Click Deals to expand the menu and click to filter by All Deals, Open Deals, Won Deals or Lost Deals.
- Utilize the “All Sales People” drop down to filter by Sales Person or use the “Search” box to filter and narrow down results by a keyword.
- Click on the orange cogwheel to expand and see “+ Add Deal” and “Edit Layout” options.
- Edit Layout - Adjust the column ordering on the CRM Deals overview page and toggle which fields are displayed.
- You can also use the (Copy, CSV, Excel, PDF, Print) icons to capture the current screen data.



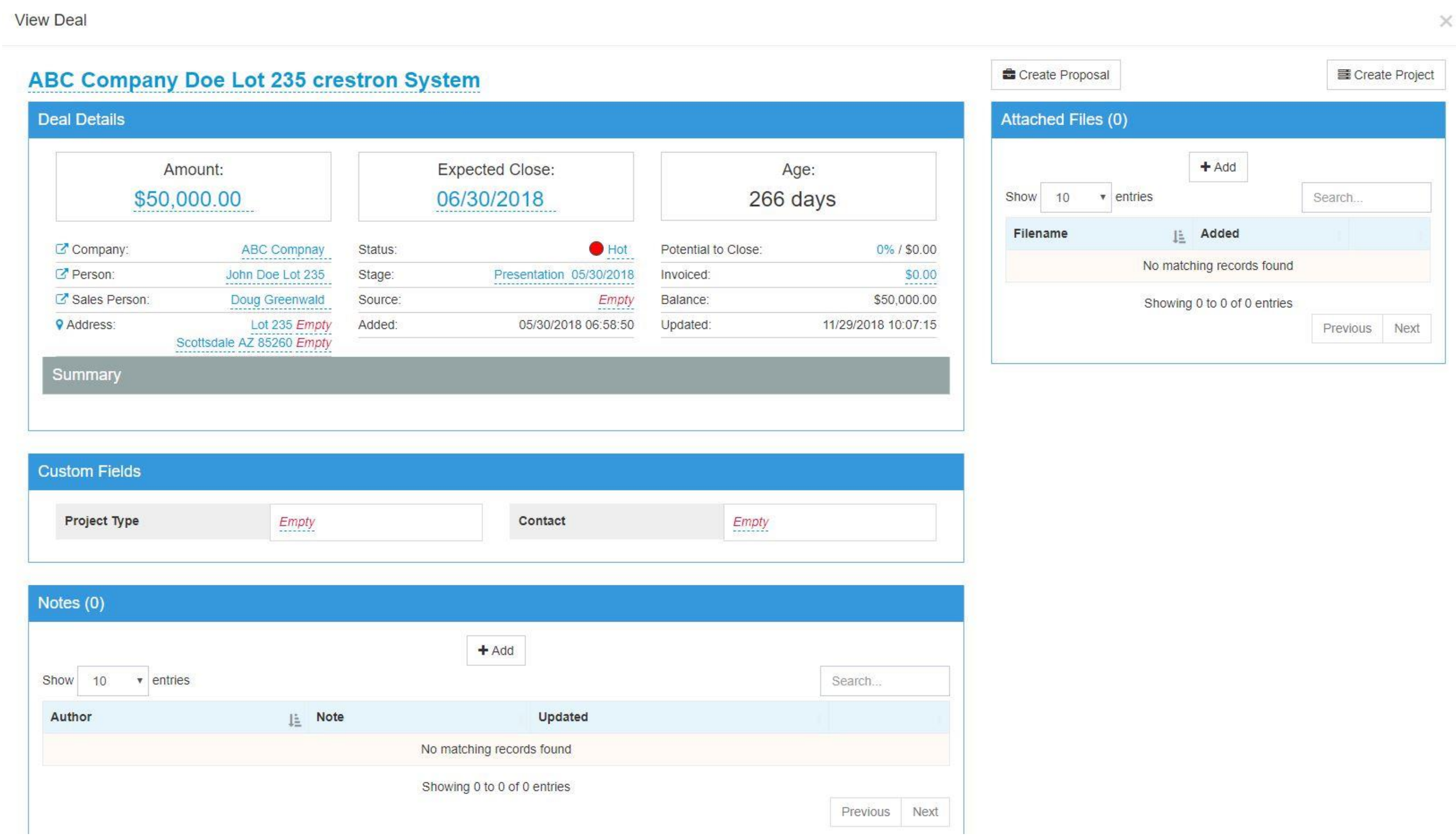
Add Deal

- Go to Deals - Click on any Deal Menu item (All, Open, Won or Lost Deals). Click the orange cogwheel and choose "+ Add Deal" or you can add a Deal in a Person or Company and that will automatically associate that Deal to that Person or Company.
- Fill out the requested information. Required fields: Deal Name, Select Person. Please note: If you fill out the deal Amount do not use the $ symbol only numbers, Example: 15000.

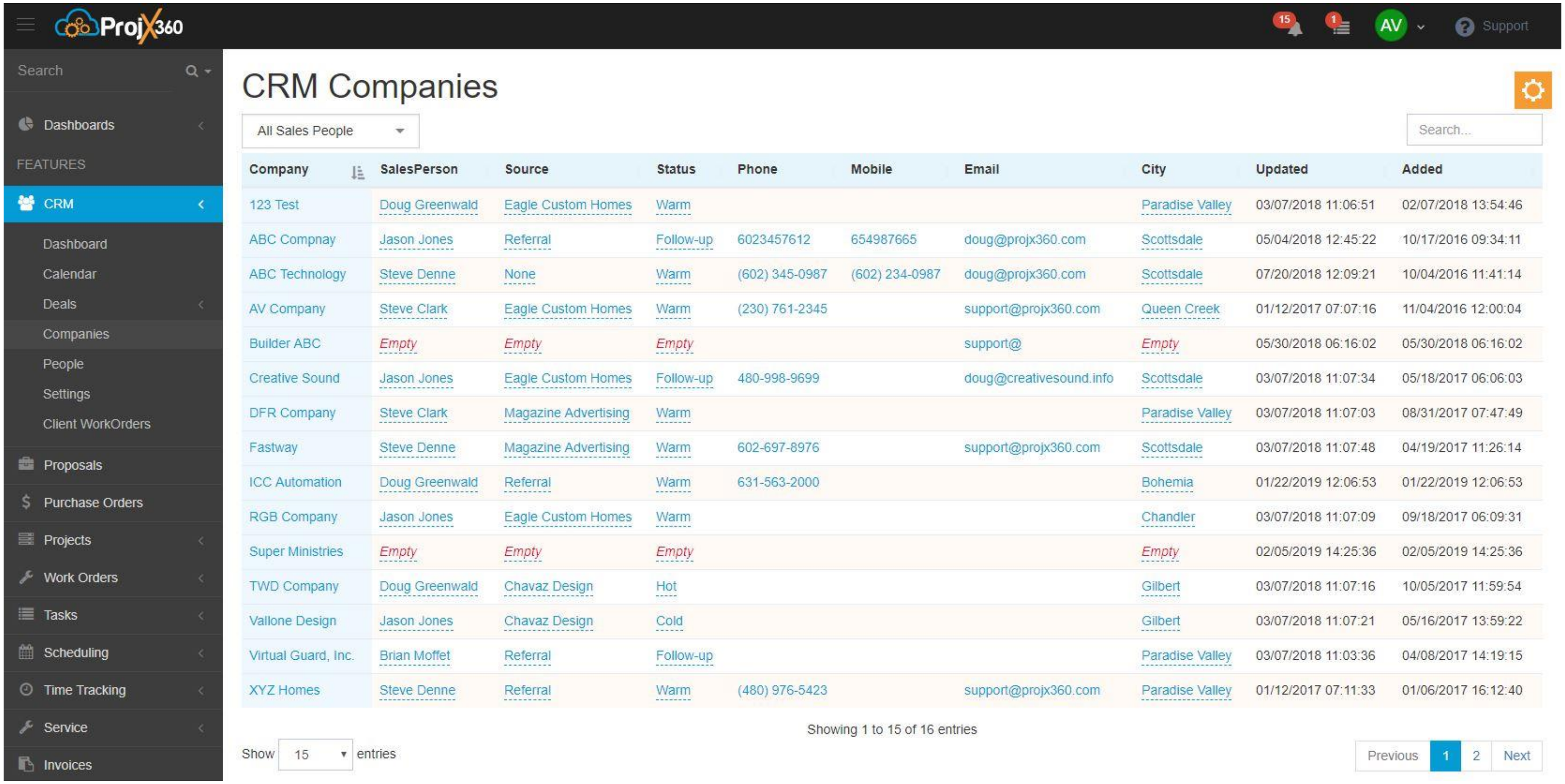


View Deal

This is your deal overview page where you are able to see all of the details regarding your deal. From a deal you can create a proposal or a project by clicking the Create Proposal or Create Project buttons in the upper right corner.



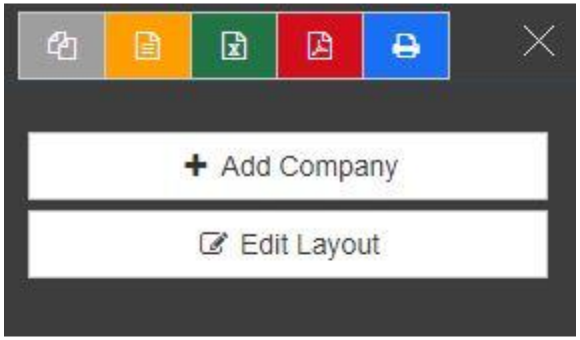
Companies

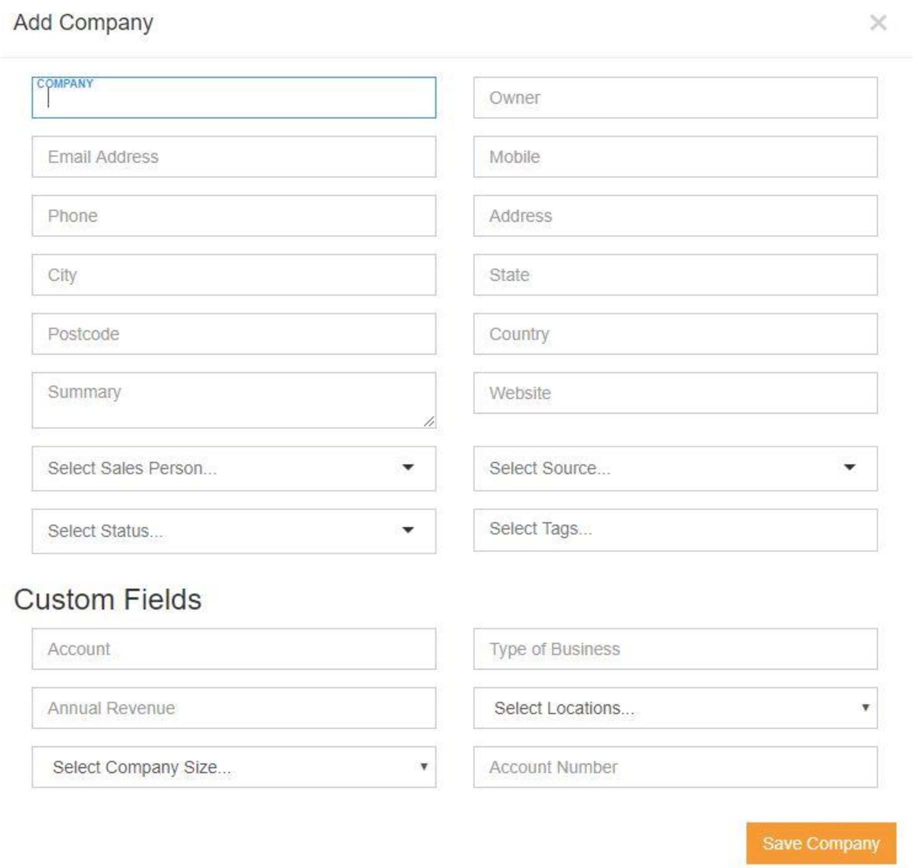


Importing Companies CSV

- Use “CRM Company CSV”. Sent with your ProjX360 welcome email. Once complete send to support@projx360.com.
- Use the provided CSV format, no extra columns can be added for import.

- Utilize the “All Sales People” drop down to filter by Sales Person or use the “Search” box to filter and narrow down results by a keyword.
- Click on the orange cogwheel to expand and see “+ Add Company” and “Edit Layout” options.
- You can also use the (Copy, CSV, Excel, PDF, Print) icons to capture the current screen data.
- Best practice is to Add a Person then associate that person with a Company.





People / Clients

If you did not purchase a Sales CRM license you will not have CRM People or Companies, instead you will only see clients from the menu.

Syncing Clients with QuickBooks

- Do not add any new client records to ProjX360 or you will not be able to sync with QB. There will be a warning message prompting this. If this happens see (I added a ProjX360 client and want to sync with QB below).
- Make sure your QB is cleaned up since it will pull all of your existing QB clients, you can't choose which ones to bring over.
- Any QB records you are not using mark them as "Inactive" so they will not pull over into ProjX360.
- Please make sure every contact has a First, Last Name, Phone Number, Email Address, Complete Address with Country if possible.
- After you have fully went through your QB and cleaned up your records it's best to do a csv export of your clients list and double check the data to make sure important fields such as first, last name are not missing. After you are sure all records are cleaned up in QB you can sync your clients.
- If you choose not to clean up QB but wish to sync some of your QB clients you can provide us the "CRM People CSV". Once we have that imported you will have to match the ProjX360 records that were sent to us on the CSV to your records in QB. Matching has to be done one time.

I added a ProjX360 client and want to sync with QB

- Use "CRM People CSV". Sent with your ProjX360 welcome email. You can run an export directly from QB. Data will have to be formatted. Once complete send to support@projx360.com.
- Use the provided format, no extra columns can be added for import.
- Auto match your clients by dragging and dropping which records are a match in ProjX360/QB.

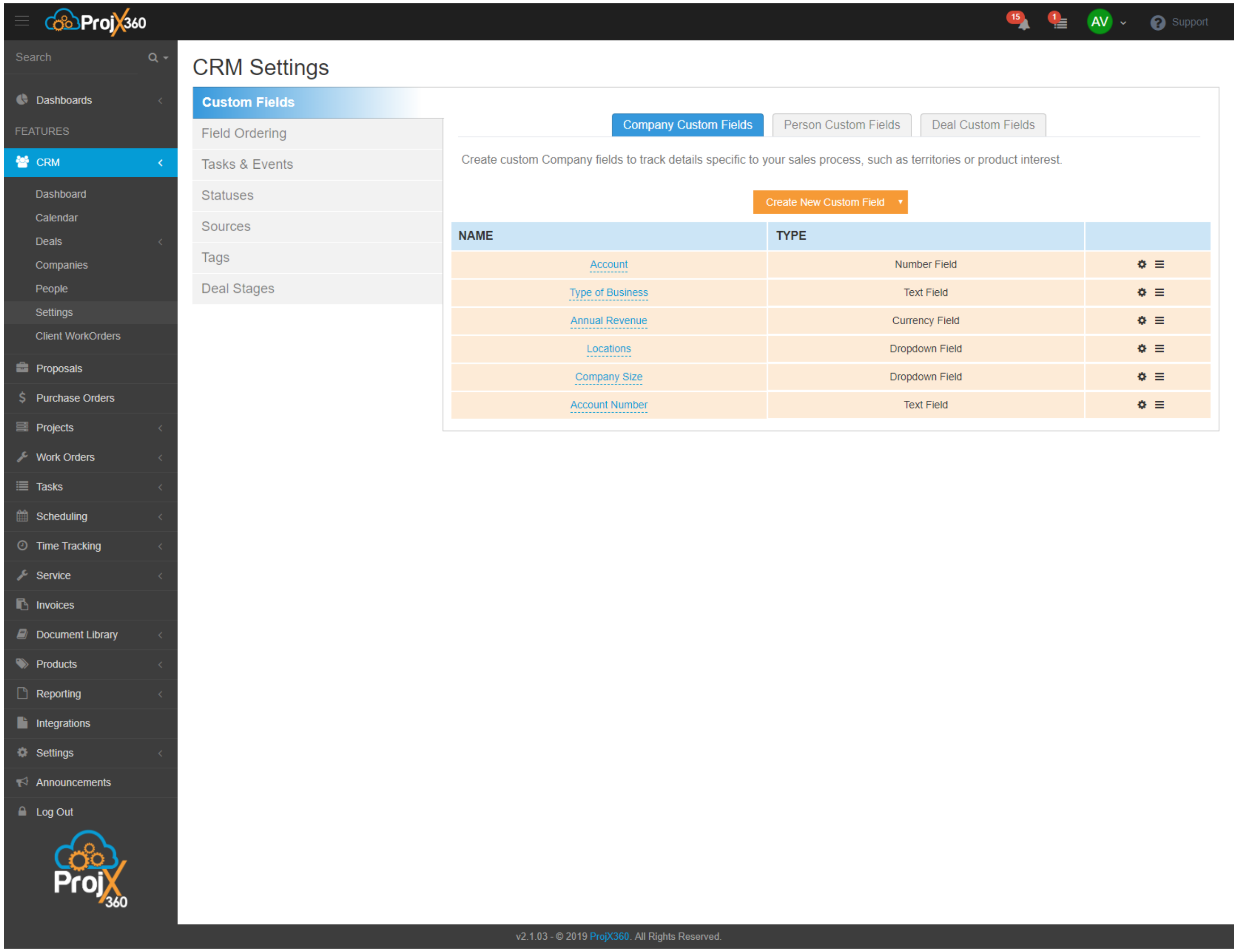
Importing Clients CSV

- Use "CRM People CSV". Sent with your ProjX360 welcome email. Once complete send to support@projx360.com.
- Use the provided format, no extra columns can be added for import.

When a new lead comes in you will go to CRM, People click the orange cogwheel "+ Add Person" to add the new lead. If they are associated to a company you can associate them while entering their information.

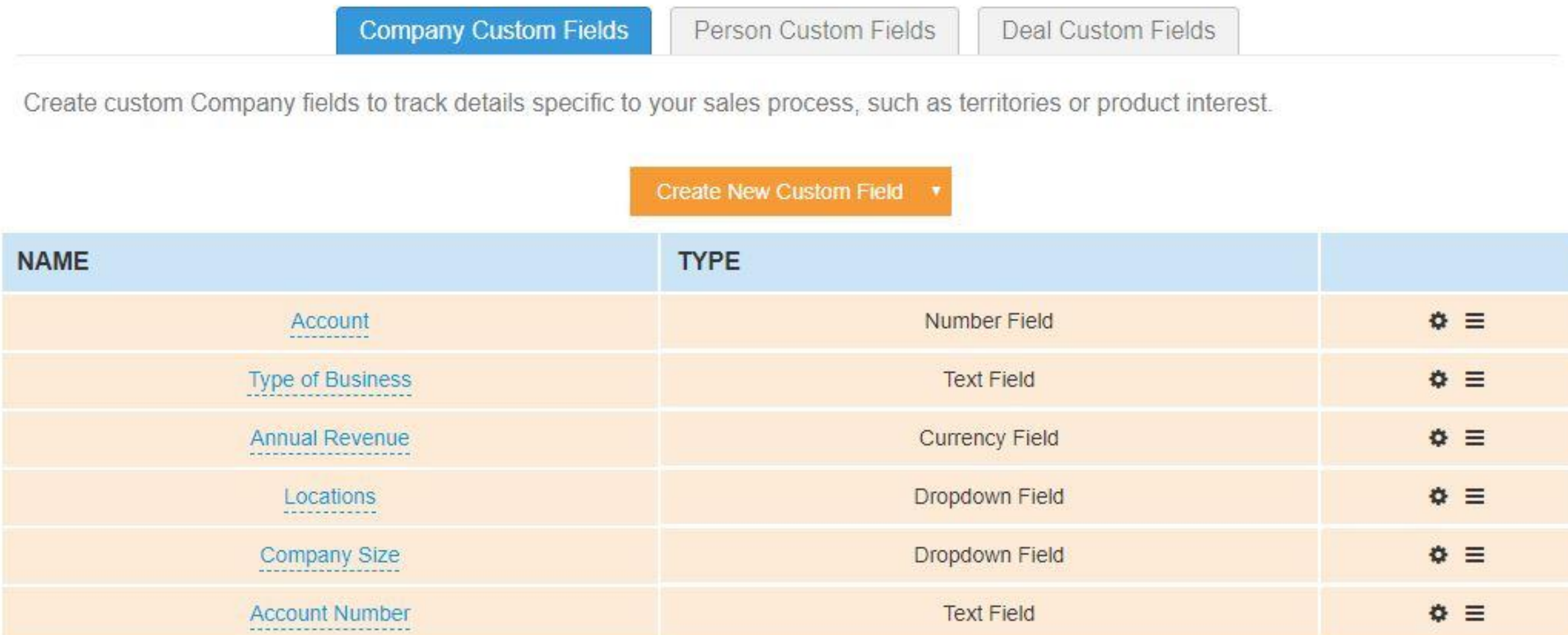
Settings

Modify your CRM Setting to fit your company needs.



Custom Fields

Create custom Company, Person or Deal fields for additional information you want your team to gather, such as territories or product interest. Use the setting cogwheel to edit the custom fields or the hamburger icon to drag and drop the order in which the appear.


Company Custom Fields | Person Custom Fields | Deal Custom Fields

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

Create New Custom Field

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

Field Ordering

Here you can customize your Company, Person or Deal field preferences. You can decide which fields are displayed, and the other order in which they appear when adding or editing a Company, Person or Deal.

Company Field Ordering | Person Field Ordering | Deal Field Ordering

Here you can customize your Company field preferences. You can decide which fields are displayed, and the order in which they appear when adding or editing a Company.

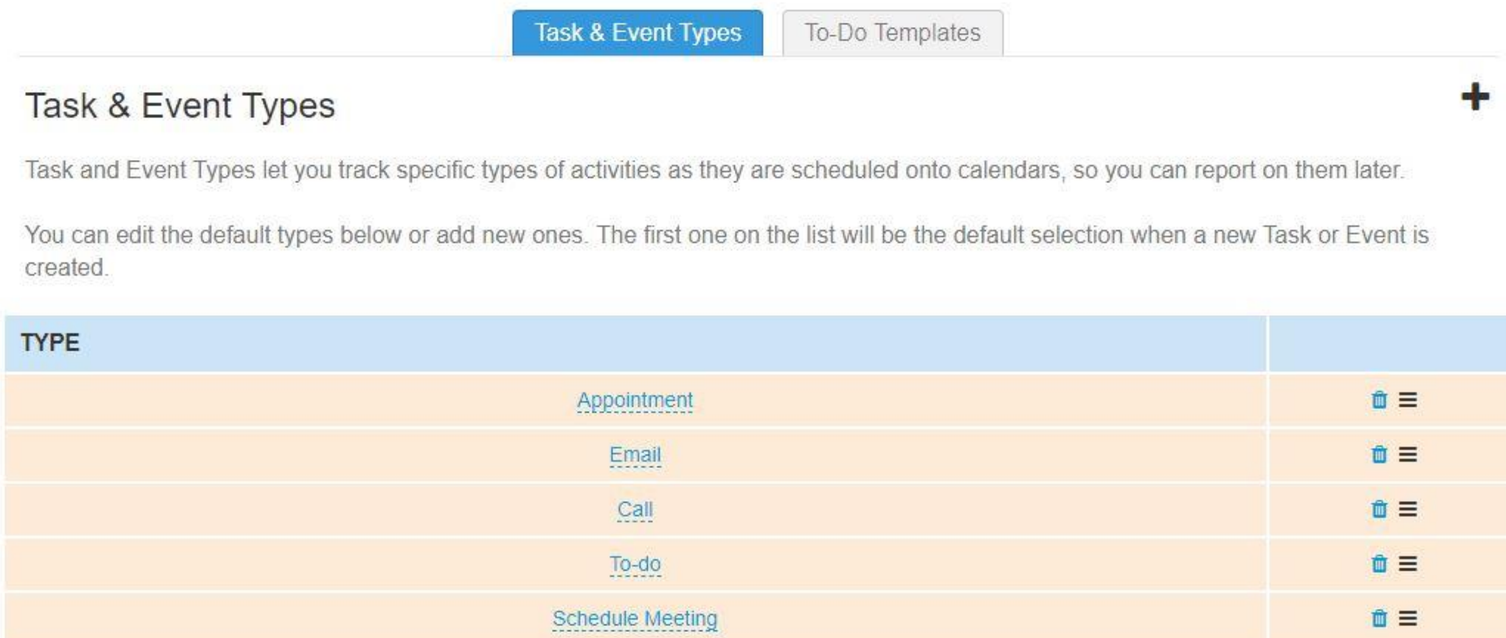
FIELDNAME	DESCRIPTION	
company	Company Name	
owner	Owner's Name	
cemail	Email	
mphone	Mobile Phone	
cphone	Company Phone	
ophone	Other Phone / Fax etc...	
caddress	Address	
caddress2	Address 2	
ccity	City	
cstate	State	
cpostcode	Postcode	
ccountry	Country	
summary	Short Summary or Note	
website	Website URL	

Tasks & Events

Task and Event Types let you create specific types of activities for your sales team. You can edit the default types below or add new ones. The first one on the list will be the default selection when a new Task or Event is created.

To-Do Templates

A To-Do Template is a series of Tasks that you can apply to People. Create, Edit or Delete your templates below.



Task & Event Types | To-Do Templates

A To-Do Template is a series of Tasks that you can apply to People.

Create, Edit or Delete your templates below.

TEMPLATE NAME	
Deals - Sales Template	⚙
Sales Process	⚙
Test	⚙
Test SoundCheck	⚙

Add New Template

View Person

Contact Info

Ace Cunningham

ABC Compnay

(480) 876-2345

(602) 345-6798

Empty

sales@projX360.com

2346 E. Bell Rd., *Empty*
Scottsdale AZ 85260 United States

Additional Information

Associated Records

Activities

+ Add Single Activity | + Add from Template

- *02/01/2018* - ***Email*** - *TestProjX360*
- *07/24/2018* - ***Call*** - *Call the client*
- *07/27/2018* - ***Email*** - *Follow Up Email*
- 07/29/2018 - **Appointment** - Set Appointment
- 01/31/2019 - **Call** - Beth Smith

Statuses

Statuses

Statuses help you sort and prioritize your relationships. You can edit the default statuses below or add new ones.

STATUS	COLOR	
Hot		
Cold		
Warm		
Follow-up		
Archived		

Sources

Sources

A source helps you understand which marketing programs are driving your business. You will also be able to track Return on Investment (ROI) using sources.

You can edit the default sources below or add new ones.

SOURCE	COST	
Chavaz Design	$0.00	
Eagle Custom Homes	$0.00	
JM Wall Development	$0.00	
Magazine Advertising	$25,000.00	
None	$0.00	default
Referral	$0.00	

Tags

Tags

Tags allow you to associate keywords with Companies and People, so you can tag your relationships by any attribute that's useful to you.

You can edit the default tags below or add new ones.

TAG	
Existing Builder	
Existing Customer	
New Builder	
New Customer	
Pits. PD	

Deal Stages

Deal Stages | Deal Loss Reasons

Deal Stages

+

Deal Stages allow you to define your sales process. A probablity is associated with each stage and indicates how likely a deal is to close. Use the default deal stages or you can customize the sales process by editing and adding new stages.

DEAL STAGE	PROBABILITY	
Lost	0	default
Qualified	10	
Request for Information	25	
Presentation	50	
Negotiation	75	
Won	100	default

Deal Lost Reasons

Deal Stages | Deal Loss Reasons

Deal Loss Reasons

+

Manage the reasons why a deal was lost so you can report on it later and refine your sales process as needed.

Reason	
No Reason	≡
Bad Contact Info	≡
Unable to Contact	≡
Loss of Interest	≡
Competitor	≡
Lack of Follow-Up	≡