



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

Sales CRM

Table of Contents

Starting Tips	3
CRM.....	4
Dashboard.....	5
Calendar	7
Deals	8
Companies	11
People / Clients	13
Settings	14
Custom Fields.....	15
Field Ordering	16
Tasks & Events	17
To-Do Templates.....	17
Statuses.....	19
Sources.....	20
Tags	21
Deal Stages.....	22
Deal Lost Reasons	22

Starting Tips

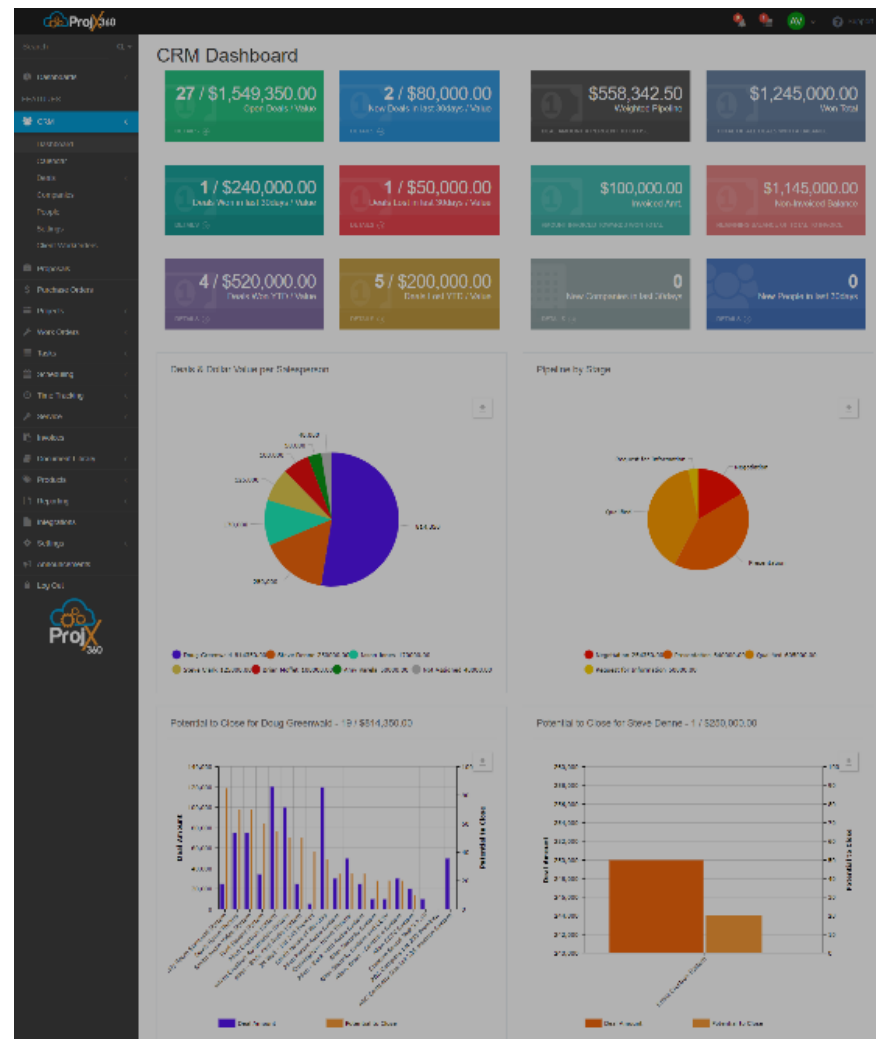
- We can only import clients, companies and products. Attachments are located in your welcome email.
- Client, Company, Proposals, Projects, Work Orders and any area that do not offer a delete option means you can't delete it. We recommend if you want to create test items do so in our free sandbox area. <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.

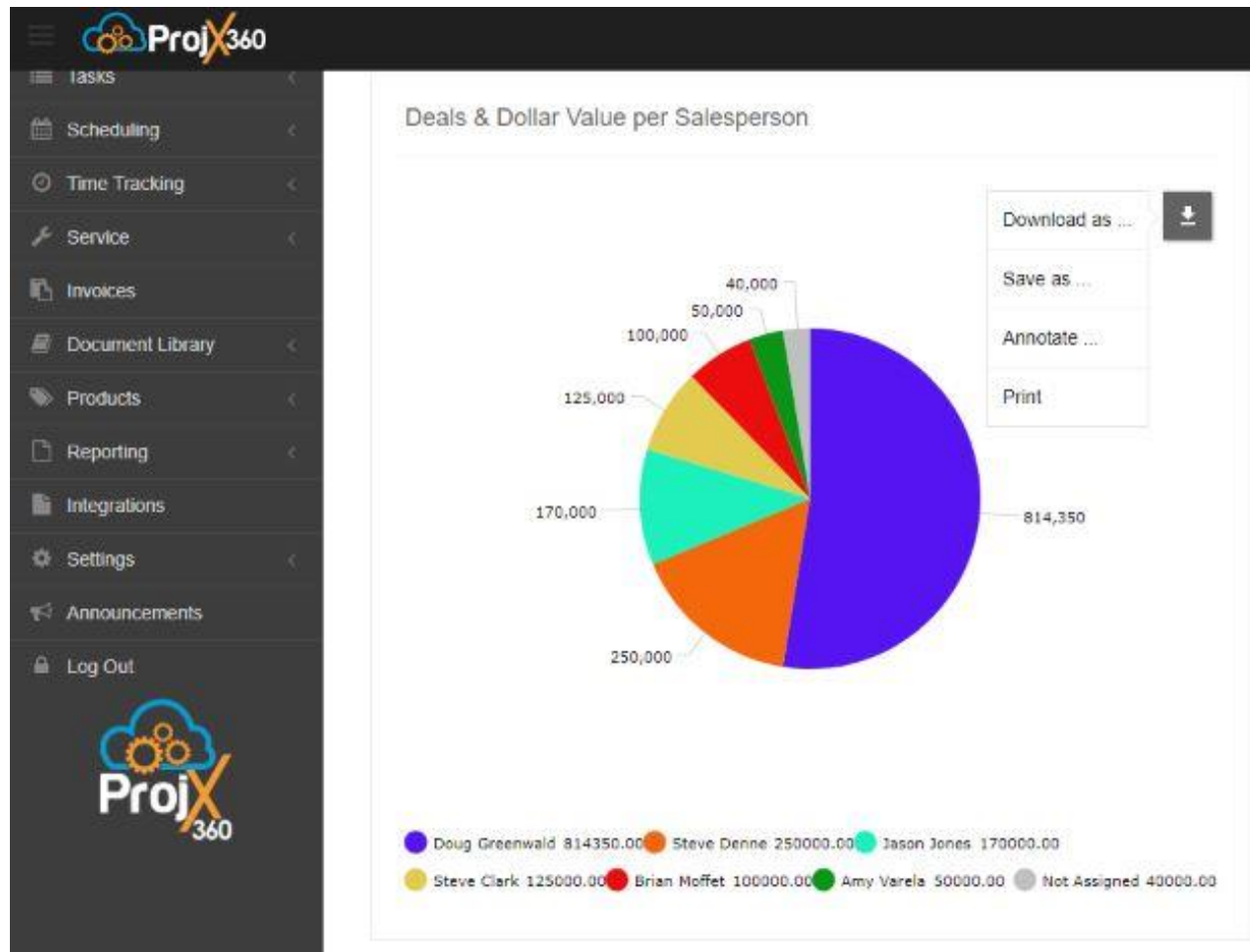
Dashboard

- 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

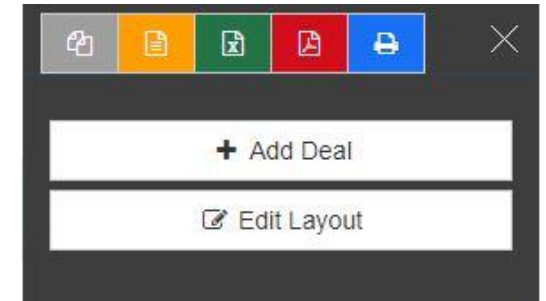
- Click “+” to add new calendar events.
- Toggle between month, week, day or list views.
- Click on any icon along the middle to switch calendars.
- Next to the CRM Calendar Title click the link icon for iCal instructions. The iCal link allows you to subscribe to the calendar on other devices and programs.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

The screenshot displays the Proj360 CRM Calendar interface. The sidebar on the left contains navigation options: Search, Dashboards, FEATURES (CRM, Proposals, Purchase Orders, Projects, Work Orders, Tasks, Scheduling), Schedule, Project Gantt View, My Schedule, Time Tracking, Service, Invoices, Document Library, Products, Reporting, Integrations, Settings, and Announcements. The top header shows the Proj360 logo, user initials (AV), and a Support link. The main calendar area is titled "CRM Calendar" and includes a "Filter By:" dropdown. The calendar is set to February 2019 and shows a meeting on February 20th. The meeting is titled "8:30a Greenwald Sales Meeting" and is highlighted in yellow. The calendar also includes a "Today" button and a "+" button to add new events.

MON	TUE	WED	THU	FRI
28	29	30	31	1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	1
4	5	6	7	8

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.



Proj360

15

AV

Support

Search

Dashboards

FEATURES

CRM

Dashboard

Calendar

Deals

All Deals

Open Deals

Won Deals

Lost Deals

Companies

People

Settings

Client WorkOrders

Proposals

Purchase Orders

Projects

Work Orders

Tasks

Scheduling

Time Tracking

Service

CRM Deals All

All Sales People

Search...

Deal Name	Amount	Invoiced Amount	Summary	Added	Updated	Company	Stage Date	Employee	Stage	Source	Status	Expected Close	First Name	Last Name
ABC - Global Test 12.3.18	50000.00	0.00		12/03/2018 13:55:17	12/03/2018 13:55:17	ABC Compnay	12/03/2018	Doug Greenwald	Presentation	Referral	Warm	2018-12-31	Brian	Jackson
ABC Company Doe Lot 235 crestron System	50000.00	0.00		05/30/2018 06:58:50	11/29/2018 10:07:15	ABC Compnay	05/30/2018	Doug Greenwald	Presentation	Empty	Hot	6/30/2018	John	Doe Lot 235
ABC Company Lot 235 Prewirew	0.00	0.00		05/30/2018 06:21:29	05/30/2018 06:22:56	ABC Compnay	05/30/2018	Doug Greenwald	Qualified	Empty	Empty	6/30/2018	John	Doe
Allen - Back Yard Audio System	25000.00	0.00		07/02/2018 05:27:20	07/02/2018 05:27:20		07/02/2018	Doug Greenwald	Negotiation	Chavaz Design	Warm	8/31/2018	Brian	Allen
Allen - Back Yard Audio System	25000.00	0.00		07/10/2018 12:18:07	08/08/2018 05:49:31		07/10/2018	Doug Greenwald	Presentation	Referral	Warm	7/31/2018	Brian	Davis
Allen - Home Theater System - Webinar 11.6.18	50000.00	0.00		01/24/2018 11:05:28	02/04/2019 06:51:55	ABC Compnay	02/04/2019	Doug Greenwald	Lost	JM Wall Development	Warm	2/28/2018	Brian	Allen
Allen CCTV System	20000.00	0.00	upgrade	05/04/2017 13:08:35	12/15/2017 11:03:35		12/15/2017	Doug Greenwald	Qualified	Referral	Warm	5/31/2017	Jason	Smith

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.

Add Deal

DEAL NAME

Select Company...

Select Stage...

Expected Close

Invoiced Amt.

Address

City

Postcode

Summary

Select Person...

Amount

Select Loss Reason...

Potential to Close 0%

Date Stage Changed

Address 2

State

Country

Select Sales Person...

Select Source...

Select Status...

Custom Fields

Select Project Type...

Contact

Save Deal

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.

View Deal



ABC Company Doe Lot 235 crestron System

Deal Details

Amount: \$50,000.00	Expected Close: 06/30/2018	Age: 266 days
Company: ABC Company	Status: Hot	Potential to Close: 0% / \$0.00
Person: John Doe Lot 235	Stage: Presentation 05/30/2018	Invoiced: \$0.00
Sales Person: Doug Greenwald	Source: Empty	Balance: \$50,000.00
Address: Lot 235 Empty Scottsdale AZ 85260 Empty	Added: 05/30/2018 06:58:50	Updated: 11/29/2018 10:07:15

Summary

Custom Fields

Project Type Empty Contact Empty

Notes (0)

+ Add		
Show 10 entries	Search...	
Author	Note	Updated
No matching records found		
Showing 0 to 0 of 0 entries		
Previous		Next

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	

Companies

Search

Dashboards

FEATURES

CRM

Dashboard

Calendar

Deals

Companies

People

Settings

Client WorkOrders

Proposals

Purchase Orders

Projects

Work Orders

Tasks

Scheduling

Time Tracking

Service

Invoices

15

1

AV

Support

CRM Companies

All Sales People

Search...

Company	SalesPerson	Source	Status	Phone	Mobile	Email	City	Updated	Added
123 Test	Doug Greenwald	Eagle Custom Homes	Warm				Paradise Valley	03/07/2018 11:06:51	02/07/2018 13:54:46
ABC Company	Jason Jones	Referral	Follow-up	6023457612	654987665	doug@projx360.com	Scottsdale	05/04/2018 12:45:22	10/17/2016 09:34:11
ABC Technology	Steve Denne	None	Warm	(602) 345-0987	(602) 234-0987	doug@projx360.com	Scottsdale	07/20/2018 12:09:21	10/04/2016 11:41:14
AV Company	Steve Clark	Eagle Custom Homes	Warm	(230) 761-2345		support@projx360.com	Queen Creek	01/12/2017 07:07:16	11/04/2016 12:00:04
Builder ABC	Empty	Empty	Empty			support@	Empty	05/30/2018 06:16:02	05/30/2018 06:16:02
Creative Sound	Jason Jones	Eagle Custom Homes	Follow-up	480-998-9699		doug@creativesound.info	Scottsdale	03/07/2018 11:07:34	05/18/2017 06:06:03
DFR Company	Steve Clark	Magazine Advertising	Warm				Paradise Valley	03/07/2018 11:07:03	08/31/2017 07:47:49
Fastway	Steve Denne	Magazine Advertising	Warm	602-697-8976		support@projx360.com	Scottsdale	03/07/2018 11:07:48	04/19/2017 11:26:14
ICC Automation	Doug Greenwald	Referral	Warm	631-563-2000			Bohemia	01/22/2019 12:06:53	01/22/2019 12:06:53
RGB Company	Jason Jones	Eagle Custom Homes	Warm				Chandler	03/07/2018 11:07:09	09/18/2017 06:09:31
Super Ministries	Empty	Empty	Empty				Empty	02/05/2019 14:25:36	02/05/2019 14:25:36
TWD Company	Doug Greenwald	Chavaz Design	Hot				Gilbert	03/07/2018 11:07:16	10/05/2017 11:59:54
Vallone Design	Jason Jones	Chavaz Design	Cold				Gilbert	03/07/2018 11:07:21	05/16/2017 13:59:22
Virtual Guard, Inc.	Brian Moffet	Referral	Follow-up				Paradise Valley	03/07/2018 11:03:36	04/08/2017 14:19:15
XYZ Homes	Steve Denne	Referral	Warm	(480) 976-5423		support@projx360.com	Paradise Valley	01/12/2017 07:11:33	01/06/2017 16:12:40

Showing 1 to 15 of 16 entries

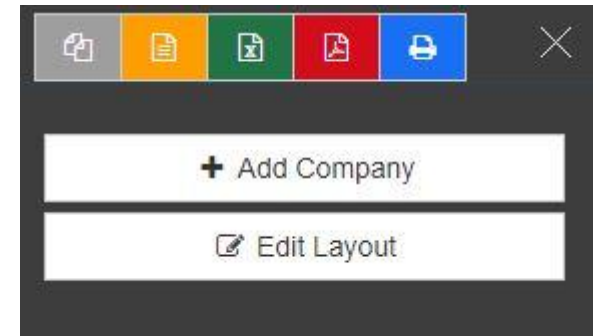
Show 15 entries

Previous 1 2 Next

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.



Add Company
×

COMPANY	Owner
Email Address	Mobile
Phone	Address
City	State
Postcode	Country
Summary	Website
Select Sales Person...	Select Source...
Select Status...	Select Tags...

Custom Fields

Account	Type of Business
Annual Revenue	Select Locations...
Select Company Size...	Account Number

Save 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.

The screenshot displays the ProjX360 CRM Settings page. The left sidebar contains a navigation menu with options like Dashboards, CRM, Settings, and various business tools. The main content area is titled 'CRM Settings' and features a 'Custom Fields' section. This section includes tabs for 'Company Custom Fields', 'Person Custom Fields', and 'Deal Custom Fields'. Below the tabs, there is a description: 'Create custom Company fields to track details specific to your sales process, such as territories or product interest.' An orange button labeled 'Create New Custom Field' is positioned above a table. The table has three columns: 'NAME', 'TYPE', and a settings icon. It lists six predefined custom fields for companies.

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	⚙️

v2.1.03 - © 2019 ProjX360 All Rights Reserved.

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 they 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.

<div>Company Field Ordering</div> <div>Person Field Ordering</div> <div>Deal Field Ordering</div>		
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

Task & Event Types +

Task and Event Types let you track specific types of activities as they are scheduled onto calendars, so you can report on them later.

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.

TYPE	
Appointment	 
Email	 
Call	 
To-do	 
Schedule Meeting	 

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 Company](#)

(480) 876-2345

(602) 345-6798

Empty

sales@projX360.com

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

Additional Information

Associated Records

+ 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 Stages		
Deal Stages allow you to define your sales process. A probability 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 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	