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## **Scheduling**

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## Starting Tips

- 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.
- 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.
- 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>

# Scheduling

## Schedule

By default you will be on the Master Schedule.

## Schedule from calendar

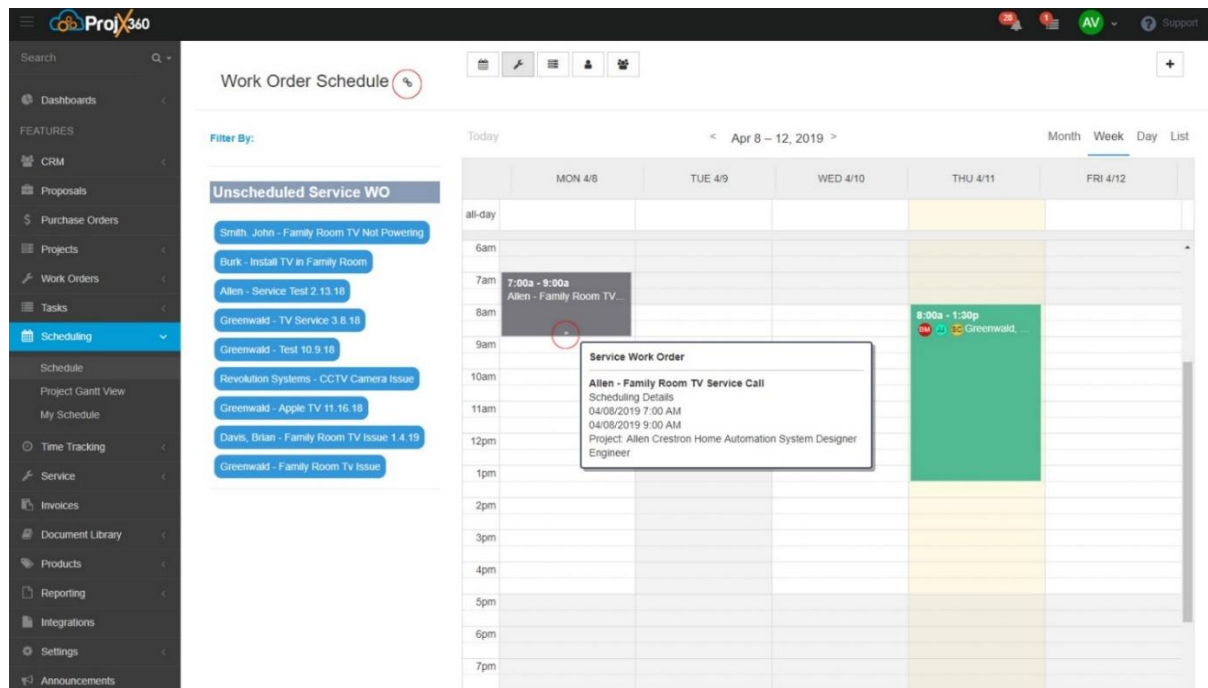
When creating a Work Order it is best practice to pick status of "Not Scheduled" so you can easily see which WO's need to be scheduled from the calendar. To schedule a Work Order just drag and drop it to the day and time. A new event will be created. Then you can add who you want to schedule and adjust the end time. When you are finished just close and it will load into the calendar.

The screenshot displays the Proj360 Master Schedule interface. On the left is a navigation sidebar with categories like 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, and Settings. The main area is titled "Master Schedule" and includes a "Filter By:" dropdown. Below this are sections for "Employees" (with icons for AV, BM, DG, JJ, SD, SC), "Unscheduled Service WO" (listing items like "Smith - John - Family Room TV Not Powering"), and "Unscheduled Project WO" (listing "Allen Savant System"). The central part of the interface is a calendar grid for April 2019, with columns for MON, TUE, WED, THU, and FRI. A red arrow points to the "Month" view selector. The calendar shows various events with colored bars and icons, such as "Greenwald - Prewire Work Order 1.3.18 | Greenwald, Doug TV Install" on Monday, "Training 4.1.19 - Final WO | Allen Control 4 System" on Friday, and "Greenwald - TV Service 3.8.18" on Tuesday. The top right of the interface shows user profile information (AV) and a "Support" link.

- Filter By: Click on “Filter By” to select multiple employees and multiple projects to filter by.
- There are icons along the middle for Master Calendar, Service WO, Project WO, Employee Schedule and CRM Calendar that filters between these calendars.
- You can also show the calendar view by Month, Week, Day or List. Week view is the best view we recommend when scheduling your Unscheduled Service WO or Unscheduled Project WO. You can drag and drop your Unscheduled items from the left side bar into the calendar on the date/time that you want and be able to easily adjust by sliding the arrow on the WO block to extend the time. \*Highlighted in red.
- When you are on the Project, Service or CRM calendar filters you can add a calendar event by clicking the “+” icon button in the upper right corner.

### iCal Download Link

Click the chain link icon for Outlook, Apple and Google iCal link instructions.



## My Schedule

Your employee schedule view. This is what the employees can use to just see their schedule.

The screenshot displays the Proj360 Employee Schedule interface. The top navigation bar includes the Proj360 logo, notification icons (28, 1), a user profile icon (AV), and a Support link. The left sidebar lists various features, with 'Scheduling' selected and expanded to show 'Schedule', 'Project Gantt View', and 'My Schedule'. The main content area is titled 'Employee Schedule' and includes a 'Filter By' dropdown and an 'Employees' list with icons for AV, BM, DG, JJ, SD, and SC. The calendar view shows the week of April 8-12, 2019, with columns for each day and rows for time slots from all-day to 1pm. Two events are visible: a blue event for Amy Varela on Wednesday from 12:00a to 2:00a, and a green event for John Smith on Friday from 6:30a to 1:30p.

	MON 4/8	TUE 4/9	WED 4/10	THU 4/11	FRI 4/12
all-day					
12am			12:00a - 2:00a AV   Amy Varela		
1am					
2am					
3am					
4am					
5am					
6am					
7am					6:30a - 1:30p AV   Smith, John - Fam...
8am					
9am					
10am					
11am					
12pm					
1pm					

# Scheduling Item Details



Title: [Davis, Bill - Prewire Work Order](#)

All Day Event

Employees

**BM** **DG** **JJ** **SD**

**SC**

Project:  
[Davis, Brian - Home Theater 1.4.19](#)

Start Date: [03/07/2019](#)

Start Time: [7:00 AM](#)

WO Title:  
[Davis, Bill - Prewire Work Order](#)

End Date: [03/07/2019](#)

End Time: [5:00 PM](#)

Description:  
[Empty](#)

**AV**