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Live Chat: https://projx360.com

Work Orders

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Starting Tips

- 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

Work Orders

Creating a work order is quick and easy. Simply give the work order a title and then choose a client, project or both. The client information will auto fill in the work order to save you time. Then choose the type of work order it is, the status and if it is billable or not and you are up and running. Once you are in the work order you can schedule technicians easily. Then start creating the tasks for your technicians that need to be completed. You can add tasks/items from a proposal, add product from the product database, add a custom checklist from your checklist library, or just add custom individual tasks/items. The technicians can then check the tasks/items off as they are completed and it date and time stamps who checked it off.

Client Work Orders

Designed for small one off jobs.

Project Work Orders

Designed for large projects as you are moving through the different stages of a project.

Service Work Orders

Designed for your service calls for finished projects or past clients.

- From the main menu you can filter WO's by clicking on Client, Project or Service.
- Click any of the top column headers (Title, Project, Type, Status, etc.) to sort the column data.
- Click any WO status tab to filter the data. (Not Scheduled, Scheduled, In Progress, Complete, etc.)
- Utilize the search feature box on the right side to narrow down results.

Title	Project	Type	Status	Age	Added	Updated	Client	Billable	Description	Actual
Allen - Family Room TV Issue	Allen Crestron System	Service	Not Scheduled	578 days	07/27/2017 11:52:33 AM	02/19/2019 9:30:51 AM	Brian Allen	Billable	Empty	901.48%
Allen - Family Room TV Service Call	Allen Crestron Home Automation System Designer Engineer	Service	Not Scheduled	529 days	09/14/2017 2:21:11 PM	12/17/2018 11:46:09 AM	Brian Allen	Billable	Empty	0.00%
Allen - Final WO	Allen Crestron System	Project	Scheduled	398 days	01/23/2018 8:20:53 AM	04/25/2018 1:06:07 PM	Brian Allen	Not Billable	Empty	0.29%
Allen - Prewire and Trim Work	Allen Crestron System	Project	Scheduled	602 days	07/03/2017 7:25:09 AM	09/27/2017 6:23:31 AM	Brian Allen	Billable	Empty	2.25%
Allen - Prewire Control 4	Allen Control 4 System	Project	In Progress	572 days	08/02/2017 9:21:12 AM	05/03/2018 6:32:03 AM	Brian Allen	Not Billable	Empty	1.00%
Allen - Prewire WO	Allen Crestron Home Automation System Designer Engineer	Project	Scheduled	466 days	11/16/2017 10:15:49 AM	12/11/2017 12:53:48 PM	Brian Allen	Not Billable	Empty	0.00%
Allen - Prewire WO 2.14.18	Allen Control 4 System	Service	In Progress	376 days	02/14/2018 10:41:55 AM	10/03/2018 9:38:30 AM	Brian Allen	Not Billable	Empty	0.00%
Allen - Prewire work order	Tufano Home Theater	Project	In Progress	654 days	05/12/2017 7:54:34 AM	06/15/2017 6:52:06 AM	Brian Allen	Billable	Empty	0.00%
Allen - Server Down	Allen Crestron Home Automation System Designer Engineer	Service	In Progress	587 days	07/18/2017 1:12:40 PM	10/03/2018 9:37:22 AM	Brian Allen	Billable	Sever is down	0.00%
Allen - Service for Family Room TV	Allen Crestron System	Service	Scheduled	635 days	05/31/2017 10:36:00 AM	08/28/2018 10:09:25 AM	Brian Allen	Billable	Empty	1.00%
Allen - Service Test 2.13.18	Allen Crestron System	Service	Not Scheduled	377 days	02/13/2018 2:53:07 PM	01/14/2019 8:12:48 AM	Brian Allen	Billable	Empty	N/A
Allen - Test WO 5.16.18	Allen Control 4 System	Project	Invoiced	285 days	05/16/2018 9:45:13 AM	09/13/2018 7:15:48 AM	Brian Allen	Not Billable	Empty	0.00%
Allen - Trim Work Order	Allen Crestron System	Project	Scheduled	606 days	06/29/2017 8:14:10 AM	11/28/2017 2:32:29 PM	Brian Allen	Billable	Empty	0.75%

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Add Workorder

- Click on the orange cogwheel to expand and see "+ Add Workorder" and "Edit Layout" options.
- You can also use the (Copy, CSV, Excel, PDF, Print) icons to capture the current screen data.
- Edit Layout - Adjust the column ordering on the Work Orders overview page and toggle which fields are displayed.
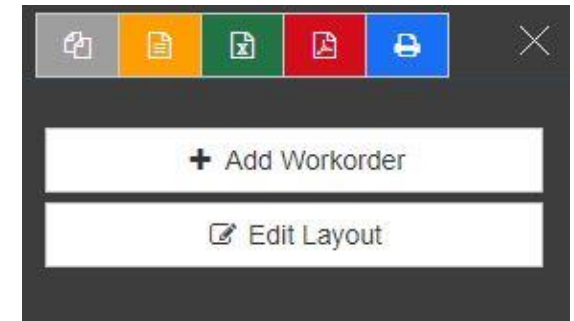
Add Workorder   ✕

                                              Generate Title

| WO Title |

| Select Client... ▼ | Select Project... ▼ | Budget Hrs. |

| Select Type... ▼ | Select Status... ▼ | Select Billable... ▼ |

| Name | Address | Address 2 |

| City | State | Post Code |

| Country | Phone | |

Description

- WO Title: Give the Work Order a title. Example: "Davis, Brian - Family Room TV Issue". *You can also use the "Generate Title" and that will auto generate a WO title for you. By default you will see "PJXGENERATED" but once you save that will assign a WO Title.
- Select Client: Choose an existing client to associate the Work Order to. Once selected the address information will auto populate.
- Select Project: Choose an existing project to associate the Work Order to. *In order to time track a project is required.
- Budget Hrs: Enter in budget hours for the Work Order. *Not required
- Select Type: Choose if the Work Order is client, project or service.
- Select Status: Choose from the existing drop down menu. Best to pick "Not Scheduled" so you can easily see which WO's need to be scheduled.
- Select Billable: Billable or Not Billable.
- Name, Address, City, State, Post Code, Country, Phone. *This information will auto populate when choosing a client if you have all of the information filled out in your client record.
- Description: Type in a Work Order description. *Not required

View Workorder 🖨

PROJECT WORKORDER

Davis, Bill - Prewire Work Order [6.500 hrs] 🖩

Status: Not Scheduled   🕐 Clock In

Work Order Information

Client Brian Davis
Name: Brian Davis
Address: 15955 N Dial Blvd
Address 2: Empty

Project Name: Davis, Brian - Home Theater 1.4.19
Phone: Empty
City: Scottsdale
Post Code: 85260

Billable: Not Billable
Email Address: Empty
State: AZ
Country: United States

Description: Empty   Notes: Empty

Added: 01/09/2019 11:12:00   Work Order Updated: 02/11/2019 05:35:16   Age: 47 Days

Schedule

+   📅

No schedules have been created for this Work Order yet.

Line Items

+   ✏

Item		Phase	Hours	
➕ [Equipment Closet] Crestron DM-NVX-351C (QTY 1) DigitalMedia™ 4K60 4:4:4 HDR Network AV Encoder/Decoder Card w/Downmixing	🏷🟨	Final	0.5	✅
➕ [Master Bedroom] Sony XBR75X850D (QTY 1) Sony XBR-75X850D		Final	1	✅
➕ [Master Bedroom] Sanus LL22 (QTY 1) LW PROFILE WALL MNT 30-60 FLT		Final	1	✅
➕ Crestron AV3 3-Series Control System®		Final	3	❌
➕ Check family room TV		Final	1	❌

Repair Items

+   🔍

No Repair Tickets Have Been Added To This Work Order Yet.

Invoices

+   📋

Davis, Bill - Prewire Work Order - Created: 01/09/2019

Associated Project WorkOrders

All   Project   Service

Davis, Bill - Prewire Work Order - Created 01/09/2019   ⚠

Client Signature

Sign Here:

✏   ✔ Save Signature

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Print

Top left corner next to View Workorder click on the print icon to print the current WO. 🖶
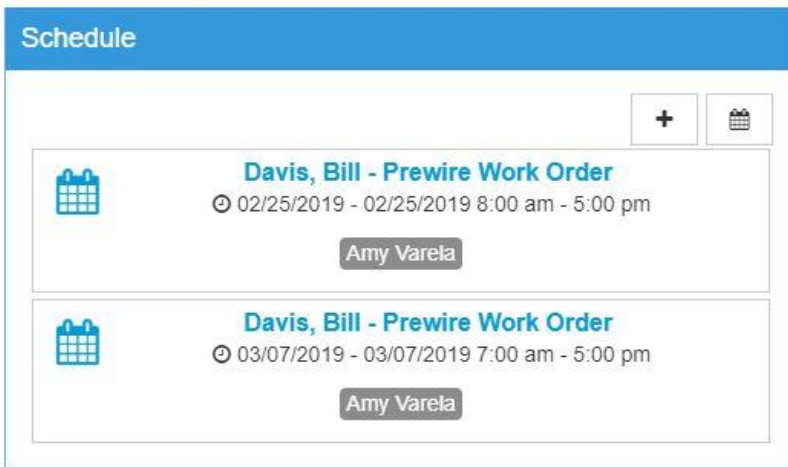
Clock In / Clock-Out

Clock In button on the top right corner of the WO. [🕑 Clock In]
Select the Phase you are clocking in to along with any notes. Click Start Time.

Clock Out button on the top right corner of the WO.

Schedule

Schedule your WO by clicking the "+" icon. As you can see from this example you are able to schedule a WO on different days. To schedule multiple just click the "+" symbol to be able to schedule another day.

- To save start date/end date click the blue check
- To save start time/end time click the blue check that will appear. ✔

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

Add Line Items

Click the "+" symbol within the line items.

Select Item Type:

Proposal Item: Choose Proposal from the drop down list. On the next page choose which proposal items will go on the WO.
Product: Choose Product from ProjX360 database.
Checklist: Choose from a Checklist you created within ProjX360.
Item: Type any custom item you want to add to the WO.

- Mark a line item complete by clicking the check. *It will turn green for complete.
- Each line item will have the technicians name with a time/date stamp so you can see exactly who and when it was marked complete.
- Expand any line item by clicking on the "+" symbol to the left of each line item.
- If the technicians are having an issue with something they can easily add notes and attachments to individual line items.
- There will be icons next to each line that has attachments or notes so you can easily spot them.

Repair Items

During the service call if a piece of equipment needs to be uninstalled and shipped in for repair, we've got you covered. With our repair tracking you can assign equipment to a project or create the repair ticket inside a work order, log all of the vital information and the issue with the piece of equipment. With our alert settings, you can setup a notification if you haven't received the part back within a specified period of time the software will alert you so you can follow up with the manufacturer so nothing falls through the cracks. Once you do get the product back you can mark the repair ticket complete and it moves the repair ticket to the completed section for your records.

Repair Items			
Ship Date	**RMA Number**	**Tracking Number**	**Status**
03/01/2019	7581650	1Z12345E1512345676	Shipped Out

Invoices

Get paid right on the spot. With ProjX360 invoicing your technicians can create an invoice while they are still on the jobsite to collect for the work they just completed. This will help with your cash flow not having to wait until the customer gets around to paying and will save you countless hours trying to collect for that invoice.

Click ➕ to create a new invoice. Click 🗋 to view all invoices.

Invoices

➕   🗋

Davis, Bill - Prewire Work Order - Created: 01/09/2019

Add times to an invoice

Click the time clock icon on the Invoice. *Circled in red.

Place a check next to each entry that you want to invoice for. Click the Save check mark.

Add Time Tracking From Work Order   ✕

Select Time Tracking Lines To Add To Invoice

| Not Invoiced | Previously Invoiced |

Not Invoiced

These entries have not been previously invoiced.

	Quantity	Phase	Unit	Ext
✓	0.0100	Final	85.00	0.850000

✔

Client Signature

Obtain a client signature to show the WO has been completed.