Production Management

Projects, Project Templates,
Production Grid and Project Costing

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Agenda

- Use Project Templates to streamline Production processes

  - Use *Days until Next Activity* to anticipate project timelines

- Apply a Project Templates to every Project

- Use the Production Grid

  - Admin Users can Add fields to the Production Grid

- Project and Project Activity List Views to organize similar tasks

- Tracking Job Costing in improveit 360

  - Track estimated versus actual Project Costs

- Common Project Reports (if there is time)

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Create Project Templates

Project Template
Permit Template

« Go to List: Project Templates

Projects [0] | Notes & Attachments [0] | Project Template History

Project Template Detail   Edit Delete Clone

▼ **Information**

Project Template Name	Permit Template	Active	✓
Description	Use this Template for all project requiring a Permit.		

▼ **Project Template Activities**

Action	Project Template Activity Name	Assigned To	Type	Days Until Next Activity	Comments
Edit | Del	Permits	Olivia Admin	Task	3 Days	Collect Permit #, Dig Date and log Project Cost for permitting.
Edit | Del	Engineering		Task		
Edit | Del	Utilities		Task		Contact Ohio 811 to mark the lines before we dig. (800) 362-2764 Record the Dig Date on the Project record.
Edit | Del	Order Materials	Patricia Production Assistant	Task	10 Days	
Edit | Del	Receive Materials	Wallace Warehouse	Task		Record a Project Cost record with a Sum of the Total Materials cost allocated for this Project.
Edit | Del	Confirmation Call		Task	1 Day	
Edit | Del	Installation		Appointment		
Edit | Del	QA Call	Patricia Production Assistant	Task		Call the Prospect and Ask the "NPS Post Install" Survey questions. Record responses on the Project record.
Edit | Del	Documentation Review	Peter Production Manager	Task	1 Day	Finalize the Project Cost records for this Project including Materials Cost, Labor Cost and Inventory Used.
Edit | Del	Inventory	Wallace Warehouse	Task		Deduct the final Materials usage from Inventory.
Edit | Del	Invoicing	Alice Accountant	Task		Email the Final Invoice to the customer. If applicable, mark the Sale as Paid in Full and Final.

Create a Template for each unique Production process or Timeline

Set the **Days Until Next Activity** to estimate the timeline of the Project

Pre-Assign steps in the Template so they are always assigned to the correct Staff member on the Project.

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Assign a Template to every Project…

Project Activities

Project Template	Permit Template			Project Start Date	3/15/2024			

Project Completed Date

Action	Project Activity Name	Assigned To	Type	Due	Start	End	Completed	Comments
Edit | Del	Permits	Olivia Admin	Task	3/15/2024				Collect Permit #, Dig Date and log Project Cost for permitting.
Edit | Del	Engineering		Task	3/18/2024				
Edit | Del	Utilities		Task	3/18/2024				Contact Ohio 811 to mark the lines before we dig. (800) 362-2764 Record the Dig Date on the Project record.
Edit | Del	Order Materials	Patricia Production Assistant	Task	3/18/2024				
Edit | Del	Receive Materials	Wallace Warehouse	Task	3/28/2024				Record a Project Cost record with a Sum of the Total Materials cost allocated for this Project.
Edit | Del	Confirmation Call		Task	3/28/2024				
Edit | Del	Installation		Appointment		3/29/2024 12:00 AM	3/29/2024 12:00 AM		
Edit | Del	QA Call	Patricia Production Assistant	Task	3/29/2024				Call the Prospect and Ask the "NPS Post Install" Survey questions. Record responses on the Project record.
Edit | Del	Documentation Review	Peter Production Manager	Task	3/29/2024				Finalize the Project Cost records for this Project including Materials Cost, Labor Cost and Inventory Used.
Edit | Del	Inventory	Wallace Warehouse	Task	3/30/2024				Deduct the final Materials usa...
Edit | Del	Invoicing	Alice Accountant	Task	3/30/2024				Email the Final Invoice to the ... mark the Sale as Paid in Full a...

Appointments get a Start / End date

Tasks get a Due date

If you've selected a Project Template with pre-defined 'Days until Next Activity', the Start and Due dates of the Project Activities will be updated to adjust to the new Project Start Date. Continue?

OK   Cancel

Note: Days Until Next Activity only Set the Dates when the **Project Start Date** is entered. When you see the pop-up Click **Cancel** and the dates will **NOT auto-populate**.

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… even if the Template is only 1 Step

Using a Project Template ensures that every Project is visible from the Production Grid

Project Activities

Project Template	Service ▼
Project Start Date ⓘ	3/26/2024
Project Completed Date ⓘ	[3/18/2024]

Show Staff Calendar

	Project Activity Name	Assigned To	Type	Start	End	Completed	Comments	✕
✚ ↑ ↓	Install	Calvin Installer 🔍	Appointment ▼ Find Time	3/26/2024 12:00 AM	3/26/2024			

Add New Activity

Completed ▢	Unassigned ▢	Due ▢	Overdue ▢	Future Date ▢	N/A ▢

Project Name ⇕	Project Manager Name ⇕	Sold Price ⇕	Sale Status ⇕	Customer Phone ⇕	Appointment Zip ⇕	Install ⇕
Service : Robinson, Johnny	Patricia Production Assistant	4523.62	Working - New	(777) 666-5555	43212	03/15/2024
Service : Test, Hugh	Peter Production Manager	1000.00	Net	(777) 666-5555	43212	03/27/2024
Service : Testing, Quote	Patricia Production Assistant	2919.00	Working - New	(866) 421-3360	43214	03/25/2024

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Using Production Grid

First select a
Project Template
then click
Refresh Grid

Filter by:
• Market Segment
• Project Manager
• Status
• Install Crew
• Sale Status

Don't have the Tab?
Give User Access to a Tab

Adding Fields to the Production Grid

Only Admin Users will be able to Add Fields

Drag and Drop the field into the **Production Grid Fields** Field Set on the Project Object.

Note: If you pull a field into the Production Grid and it displays a Record ID (like the Installation Crew field), you will instead need to create a **Formula** Text field to pull the Name from the related Staff record that is being looked up to.
See also: Cross Object Formula Field

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Project Lists

Organize Projects by PM, Market, Status or any combination

Projects

							A	B	C	D	E	F

Projects on Hold ▾ | Edit | Delete | Create New View

New Project | Print/Email | ↻

	Action	Project Name ↑	Project Number	Sale	Sale Rep	Sale Status	Status	Customer Zip
☐	Edit | Del	Bathrooms : Rogers,…	PRJ52	Bathrooms;Windows;…	Billy Sales Rep	Net	On Hold	43215
☐	Edit | Del	Doors : Test, David	PRJ21	Doors : Test, David		Final	On Hold	43212
☐	Edit | Del	Flooring : Test, Virginia	PRJ16	Flooring : Test, Virginia	Sammy Sales	Paid In Full	On Hold	43215
☐	Edit | Del	Windows : Frank, Nic…	PRJ17	Windows : Frank, Nic…		Paid In Full	On Hold	43212
☐	Edit | Del	Windows : Smith, Pearl	PRJ10	Doors : Smith, Pearl	Sammy Sales	Final	On Hold	43215
☐	Edit | Del	Windows : Test, Maxi…	PRJ35	Windows : Test, Maxi…	Sammy Sales	Paid In Full	On Hold	43201

Note: To Filter Projects by a specific Date from an individual Project Activity, that Date would need to be captured somewhere on the Project itself.
Improveit 360 can configure an automation to auto-populate those Dates as a paid service.

Project lists should group like Projects together.
Examples:
- Active Roofing Projects
- Projects with a Balance Due
- "Bob" is the Project Manager

Projects

Patricia's Open Projects ▾ | Edit | Delete | Create New View

New Project | Print/Email | ↻

						A	B	C	D	E

	Action	Project Name ↑	Product Category	Project Start Date	Project Completed Date	Sold Price	Balance Due
☐	Edit | Del	Doors : Test, Gary	Doors	3/15/2024		$1,000.00	✔
☐	Edit | Del	Flooring : Turner, Bill	Flooring	2/6/2024		$4,730.00	☐
☐	Edit | Del	Siding : Test, Christopher	Siding	3/4/2024		$7,525.00	☐
☐	Edit | Del	Siding : Test, Thurman	Siding	2/1/2024		$2,000.00	☐

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Project Lists con't

Set Filters to show only specific Projects

Note: A combination of Filters are normally needed. In this example, the Project Managers do not want to see Projects which are Canceled or Completed in the List View.

If you use Staff-specific List Views and a new person starts working for you, you will need to build a new list for them!

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Project Activity Lists

List Views help sort and filter Project Activities

Project Activities

Installs pending Completion ▾ Edit | Delete | Create New View

New Project Activity

	Action	Project	Project Status	Address	Project Manager	Predecessor Activity	Predecessor Status	Start ↑	End	Completed	S
☐	Edit | Del	Siding : Test, Thurm...	Active	183 Thurman	Patricia Production ...	Confirmation Call	Completed	2/15/2024 7:30 PM	2/15/2024 7:30 PM		
☐	Edit | Del	Flooring : Turner, Bill	Active	123 Fake St	Patricia Production ...	Confirmation Call	Pending	2/20/2024 12:00 AM	2/20/2024 12:00 AM		
☐	Edit | Del	Windows : Test, Im...	Active	123 Import Quote	Peter Production ...	Receive	Completed	2/29/2024 4:30 PM	2/29/2024 4:30 PM		
☐	Edit | Del	Windows : Darah, E...	Active	1505 West Fifth	Peter Production ...	Receive	Pending	3/15/2024 1:00 AM	3/15/2024 1:00 AM ✏️		
☐	Edit | Del	Siding : Test, Christ...	Active	123 Christopher St	Patricia Production ...	Confirmation Call	Completed	3/26/2024 2:30 PM	3/26/2024 2:30 PM		
☐	Edit | Del	Windows : Test, Mo...	Active	123 Dan St	Peter Production M...	Confirmation Call	Completed	3/26/2024 6:30 PM	3/26/2024 6:30 PM		
☐	Edit | Del	Doors : Test, Gary	Active	123 Gary St	Patricia Production ...	Confirmation Call	Pending	3/29/2024 12:00 AM	3/29/2024 12:00 AM		

Every business using improveit 360 names their Project Activity steps uniquely.
You will want to create List Views to track the steps in your specific Production Process.

Note: **Predecessor Activity** is the Step immediately before this one in the Template. **Predecessor Status** tells you if that Step has been Completed or not. In the screen shot above the Darah Windows project hasn't received Materials yet and we see this information in the Predecessor fields.

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Project Activity Lists con't

Set Filter Conditions & when to use Predecessor Status

Filter By Additional Fields (Optional):

Field	Operator	Value	
Project Activity Name	contains	Install	AND
Project Status	equals	Active	AND
Type	equals	Appointment	AND
Completed	equals		AND
Start	not equal to		

Filter By Additional Fields (Optional):

Field	Operator	Value	
Project Activity Name	contains	Receive	AND
Completed	equals		AND
Project Status	not equal to	Canceled, Completed	AND
Predecessor Status	equals	Completed	AND
--None--	--None--		

Project Activity lists should Filter down to capture specific Production Steps which require the same type of Action, examples:

- Installs Pending Completion
- Orders to Receive
- Utilities need Marked

Note: **Predecessor Status** equals Completed as a Filter ensures that you will not see Projects where the Step preceding has not been Completed. This may be appropriate for some lists and not others.

Example: If the step preceding the Installation is a Confirmation Call to the Prospect 24 Hours prior, we do not want to exclude Installs from our list of "Installs Pending Completion" just because the Confirmation Call was never completed. By contrast, in an "Orders to Receive" list the step preceding was the "Order materials" step. If the Materials were never Ordered, you would not want that Receive step to show up in the List of Projects we're anticipating to receive materials for.

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Tracking Project Costs

Enter your spending after the job is finished

Project Costs [3] | Purchase Orders [0] | Open Activities [0] | Activity History [0] | Project History | Notes & Attachments [2]

Project Costs

New Project Cost

Project Costs Help ?

Action	Project Cost ID	Type	Memo	Payment Type	Amount	Paid On
Edit | Del	PC021	Labor	Auto-generated because the Crew Time Final Date on the Project has been entered.		$798.40	
Edit | Del	PC022	Materials		Credit Card	$214.75	5/5/2021
Edit | Del	PC087	Commission		Check	$360.00	5/1/2021

Use the **Type** field to indicate what the expense was for, and be able to Report on the % each expense is of the total Costs.

	Sold Price	Profit	Amount	Project Costs Total	% of Total Cost	Margin %
Project Number: PRJ09 (3 records)						
	$3,600.00	$2,226.85	$1,373.15	$1,373.15		61.86%
Type: Commission (1 record)						
	$3,600.00	$2,226.85	$360.00	$1,373.15	26.2%	
Type: Labor (1 record)						
	$3,600.00	$2,226.85	$798.40	$1,373.15	58.1%	
Type: Materials (1 record)						
	$3,600.00	$2,226.85	$214.75	$1,373.15	15.6%	

Note: **Purchase Orders** created from improveit 360 automatically create a **Project Cost** record.

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Estimated vs Actual Project Costing

This custom configuration determines estimated and actual costs

Costs and Profit

Estimated Profit	$3,488.25		Actual Profit	$3,607.60
Estimated Profit Margin	46%		Actual Profit Margin	48%
Estimated Project Costs Total	$4,036.75		Actual Project Costs Total	$3,917.40
Estimated Labor Amount	$903.00		Actual Total Labor Cost	$708.65
Estimated Labor Rate	12.00%		Actual Labor Rate	9.42%
Sold Price	$7,525.00		Project Incentive Total	$119.35

Note: **Purchase Orders** are automatically given a Type Detail of "Actual" in this custom configuration.

Reach out to our team if you'd like to add this customization to your system!

Use a new custom **Type Detail** field to indicate if the Project Cost was **Estimated** or **Actual**. Compare Estimated Total Cost to Actual Total Cost.

This customization starts at $750

Project Costs   New Project Cost

Action	Project Cost ID	Type	Type Detail	Memo	Amount	Paid On
Edit | Del	PC088	Other Direct	Estimated		$500.00	
Edit | Del	PC089	Materials	Estimated	25%	$1,881.25	
Edit | Del	PC090	Labor	Estimated	12%	$903.00	
Edit | Del	PC091	Commission	Estimated		$752.50	
Edit | Del	PC092	Materials	Actual	Hardie PO 84599	$1,956.25	3/4/2024
Edit | Del	PC093	Commission	Actual	Billy Sales Rep	$752.50	3/8/2024
Edit | Del	PC094	Equipment Rental	Actual	Dumpster Fee	$500.00	3/4/2024
Edit | Del	PC095	Labor	Actual	Jose and Carl, 1/2 Day	$708.65	3/8/2024

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Report on Projects and Activities

Most common Production Out-of-the-Box Reports

Name ↑
Active Projects
Active Projects by Product Category
Active Projects by Project Manager
Projects with Project Costs

Use the Show Details button to see the records which make up the Data in the Report Show Details

Range
Current CY
From
1/1/2024
To
12/31/2024

Use the Date Field and Range to Filter Data on a specific Date Range.

Note: Not all Projects have a Start Date. We recommend filtering on Sold On Date or Created Date of the Project.

Click here for: How to change a Report Grouping

Note: Reports for specific Project Activities are custom based on how your company Names your Project Activity records.

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Complete the Project in improveit 360

Last step! Enter Project Completed Date and Sale Final On Date

Entering the Project Completed Date will populate the Completed date for any Activities still open, ensuring they no longer display on the Production Grid.

Final the Sale in improveit 360

Entering the Final On date calculates any Commission Adjustments or final payments due to the Staff member and ensures a Marketing Opportunity is open for the Prospect.

How to Reach Us

1. Admins – Use the Help Bot within your system: Click **Get in Touch**

2. Open a Ticket at: https://support.improveit360.com/

3. Or Email Us: support@improveit360.com

Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time
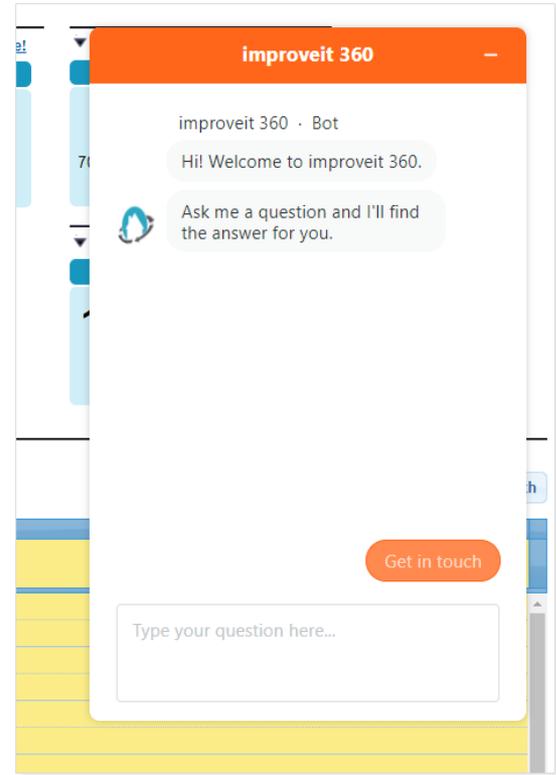
Thanks
for Attending

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