Production Management

Projects, Project Templates, Production Grid and Project Costing



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)



Create Project Templates

« Go to L	oject Template ermit Template ist: Project Templates					2
				Projects [0] Notes & Att	achments [0] Project Template History	
Project	Template Detail		Edit	Delete Clone		
▼ Informa	ation					
	Project Template Name Perr	nit Template			Active	
	Description Use	this Template 1	for all project r	equiring a Permit.		
▼ Project	Template Activities					
Action	Project Template Activity Nam	e Assigned To	Туре	Days Until Next Activity	Comments	
Edit De	Permits	<u>Olivia</u> Admin	Task	3 Days	Collect Permit #, Dig Date and log Project Cost for permitting.	
Edit De	Engineering		Task			
Edit De	<u>Utilities</u>		Task		Contact Ohio 811 to mark the lines before we dig. (800) 362-2764 Record the Dig Date on the Project record.	
Edit De	Order Materials	Patricia Production Assistant	Task	10 Days		
Edit De	Receive Materials	Wallace Warehouse	Task		Record a Project Cost record with a Sum of the Total Materials cost allocated for this Project.	
Edit De	Confirmation Call		Task	1 Day		
Edit De	Installation		Appointment			
Edit De	QA Call	Patricia Production Assistant	Task		Call the Prospect and Ask the "NPS Post Install" Survey questions. Record responses on the Project r	ecord.
Edit De	Documentation Review	<u>Peter</u> Production Manager	Task	1 Day	Finalize the Project Cost records for this Project including Materials Cost, Labor Cost and Inventory Us	sed.
Edit De	I Inventory	Wallace Warehouse	Task		Deduct the final Materials usage from Inventory.	
Edit De	I Invoicing	<u>Alice</u> <u>Accountant</u>	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.



Assign a Template to every Project...

Project /	Activities								
	Project Template 📀	Permit Template				Project Star	rt Date 🕜 3/1	5/2024	
						Project Complete	d Date 📀		
Action	Project Activity Name	Assigned To	Туре	Due	Start	End	Completed	Comments	
Edit <u>Del</u>	Permits	Olivia Admin	Task	3/15/2024				Collect Permit #, Dig Date and permitting.	log Project Cost for
<u>Edit Del</u>	Engineering		Task	3/18/2024					
Edit <u>Del</u>	<u>Utilities</u>		Task	3/18/2024				Contact Ohio 811 to mark the I 362-2764 Record the Dig Date on the Pro	ines before we dig. (800) bject record.
Edit Del	Order Materials	Patricia Production Assistant	Task	3/18/2024					
Edit Del	Receive Materials	<u>Wallace</u> Warehouse	Task	3/28/2024				Record a Project Cost record v Materials cost allocated for this	vith a Sum of the Total 9 Project.
Edit <u>Del</u>	Confirmation Call		Task	3/28/2024					
<u>Edit Del</u>	Installation		Appointment	t	3/29/2024 12:00 AN	1 3/29/2024 12:00 AM	Λ		
Edit Del	QA Call	Patricia Production Assistant	Task	3/29/2024				Call the Prospect and Ask the questions. Record responses of	NPS Post Install" Survey on the Project record.
Edit Del	Documentation Review	Peter Production Manager	Task	3/29/2024				Finalize the Project Cost recomincluding Materials Cost, Labor Used.	ds for this Project Cost and Inventory
Edit Del	Inventory	<u>Wallace</u> Warehouse	Task	3/30/2024				Deduct the final Materials usa	If you've selected a Proje Activity', the Start and D
Edit Del	Invoicing	Alice Accountant	Task	3/30/2024				Email the Final Invoice to the mark the Sale as Paid in Full a	updated to adjust to the

Appointments get a Start / End date

Tasks get a Due date

f 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?

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**.



Cancel

... even if the Template is only 1 Step

						-	
Project Activities						Project	
Project Template Service	Template ensures that						
Project Activity Name Assigned To Install Calvin Installer	×	 is visible fr the Production Grid 					
Add New Activity						Produc [:] Grid	tion
Add New Activity Completed Unassigned	Due Overdue	Future Da	te N/	A		Product Grid	tion
Completed Unassigned Project Name	Due Overdue	Future Da	te N/ Sale Status \$	A Customer Phone \$	Appointment Zip	Product Grid	tion
Add New Activity Completed Unassigned Project Name Service : Robinson, Johnny	Due Overdue	Future Da	te N/ Sale Status \$ Working - New	A Customer Phone ¢ (777) 666-5555	Appointment Zip	Product Grid	tion
Add New Activity Completed Unassigned Project Name Service : Robinson, Johnny Service : Test, Hugh	Due Overdue • Project Manager Name • Patricia Production Assistant • Peter Production Manager	Future Da	te N/ Sale Status \$ Working - New Net	A Customer Phone \$ (777) 666-5555 (777) 666-5555	Appointment Zip 43212 43212	Product Grid p • Install 03/15/2024 03/27/2024	tion



I laing a

Using Production Grid

Production Grid			First select a	
Criteria			Project l'emplate	
Project Template	Permit Template	Project Status Active	then click	A Davi Daviada
Market Segment	Permit Template Punchwork Sonvice Historic District	Project Manager All	Refresh Grid	Pay Simple Settings
Installation Crew	Siding Install Tub/Shower Project	Sale Status All	Filter by:	People
Ignore Non-Template Activities	Window Install Historic District	Refresh Grid	Market Segment	Production Grid
Print		Download CSV	Project Manager	Products
			• Status	Dap't have the Tab?
mpleted Unassigned	Due Overdue	Future Date N/A	Install CrewSale Status	Give User Access to a Tab
Print Unassigned	Due Overdue	Download C SV	 Project Manager Status Install Crew Sale Status 	Production Grid Products Don't have the Ta Give User Access

Project Name 🔶	Sale Rep ≑	Project Manager ¢ Name	Sold Price \$	Sale Status ^{\$}	Customer Phone $^{\diamond}$	Appointment City	Permits \$	Engineering ¢	Utilities +	Order Materials ^{\$}	Receive Materials ^{\$}	Confirmation Call \$	Installation +	QA Call 💠	Documentation Review	Inventory \$	Invoicing \$
Siding - Test Christenher	Commy Color		7525.00	Daid In Full	(777) 666 5555	Columbus	03/04/2024	03/06/2024	03/07/2024	03/07/2024	03/18/2024	03/18/2024	03/26/2024	03/27/2024	03/28/2024	03/28/2024	03/27/2024
Siding : lest, Christopher	Saminy Sales		7525.00	Falu III Fuli	(111) 000-5555	Columbus	02/02/2024	02/02/2024	02/02/2024	02/05/2024	02/12/2024	02/14/2024	02/15/2024	02/16/2024	02/15/2024	02/16/2024	02/16/2024
Siding : Test, Thurman	Sammy Sales		2000.00	Net	(777) 666-5555	Columbus	02/02/2024	02/02/2024	02/02/2024	02/05/2024	02/12/2024	02/14/2024	02/15/2024	02/10/2024	02/15/2024	02/10/2024	02/10/2024
Windows : Darah, Emmanuel	Sammy Sales		6320.00	Net	(777) 666-5555	Columbus										03/16/2024	03/16/2024
Windows : Test, Import Quote			2600.00	Net	(777) 666-5555	Columbus										02/29/2024	02/29/2024
Windows : Test, Mobile App Sale	Sammy Sales		1500.00	Net	(777) 666-5555	Columbus	03/12/2024	03/15/2024	03/15/2024	03/15/2024	03/20/2024	03/21/2024	03/26/2024	03/27/2024	03/27/2024	03/27/2024	03/27/2024



Adding Fields to the Production Grid

Only Admin Users will be able to Add Fields

Appointment Zip

Field Sets	Production Grid Fields	~						1	1	1		
Action Field Label	Save Cancel 🔊 Undo	🐢 Redo 📔 🖬 Field S	et Properties			Sold Price +	Sale	Customer .	Appointment	Appointment	Installation	Measure +
Edit Del Crew Time Metrics	Project	Quick Find Pro	ject Name	8			Status	Phone	City	Zip	Crew	
Edit DEPRECATED Sale Information	Certified Renovator	tual Labor Amount	Appointment Latitude	Appt Calendar Com	Commission PC Cre							
Edit Del Measurements	Created By ID	tual Labor Rate	Appointment Longi	Balance Due	Commission Projec	1000.00	Net	(777) 666-5555	Columbus	43212		
Edit 🏾 📥 Mobile List Project	Installation Crew	pointment Address	Appointment State	Certified Renovator	Company							
Edit Mobile Nearby Search Results	Project Manager	pointment City	Appointment Zip	Comments	Completed	4730.00	Final	(515) 277-6666	Columbus	43212	a0j1U000001NIT6QAK	
Edit Mobile View Project	Prospect											
Edit Production Grid Fields	Sale					7525.00	Paid In Full	(777) 666-5555	Columbus	43212	a0j1U000001NISwQAK	
Edit 🛃 Project - Cost And Profit	Drag any of the fields above	e into the list below.										
Edit Project - Information						2000.00	Net	(777) 666-5555	Columbus	43206		
Edit Del Project Milestones & Dates	In the Field Set 🛄											
Edit 🛃 Prospect Timeline	Sale Rep					6320.00	Net	(777) 666-5555	Columbus	43212		03/08/2024
	Project Manager Nam	e										
	Sold Price					2600.00	Net	(777) 666-5555	Columbus	43212		02/09/2024
	Sale Status											
	Customer Phone											
	Appointment City					Not	e: If vo	llua ud	a field	into the	Product	ion
						1100						

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: <u>Cross Object Formula Field</u>



Project Lists

Organize Projects by PM, Market, Status or any combination

Projec	Projects											
Yrojec	Projects on Hold Edit Delete Create New View											
New Project	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	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	\checkmark					
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										



Project Lists con't

¥

Columbus Open Projects

Set Filters to show only specific Projects

Filter By Additional Fields (Optional): Field Value Operator Columbus Market Segment equals ¥ × AND Active, On Hold S AND Status equals \sim × --None----None--× \sim AND --None----None--× ¥ AND --None----None--× \sim

Patricia's Open 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!

Filter By Additional Fields (Optiona Field	l): Operator	Value	
Project Manager Name	✓ contains	✓ Patricia	AND
Status	✓ equals	✓ Active,On Hold	S AND
None	✓None	~	AND
None	✓None	~	AND
None	✓None	▶	

×



Project Activity Lists

List Views help sort and filter Project Activities

Pr	Project Activities										
1	Installs pending Completion Edit Delete Create New View										
New	Project A	ctivity									
	ction	Project	Project Status	Address	Project Manager	Predecessor Activity	Predecessor Status	Start +	End	Completed S	
E	dit Del	Siding : Test, Thurm	Active	183 Thurman	Patricia Production	Confirmation Call	Completed	2/15/2024 7:30 PM	2/15/2024 7:30 PM		
🗆 E	dit 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		
🗆 E	dit Del	Windows : Test, Im	Active	123 Import Quote	Peter Production	Receive	Completed	2/29/2024 4:30 PM	2/29/2024 4:30 PM		
E	dit Del	Windows : Darah, E	Active	1505 West Fifth	Peter Production	Receive	Pending	3/15/2024 1:00 AM	3/15/2024 1:00 AM	9	
🗆 E	dit 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		
E	dit 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		
E	dit Del	<u>Doors : Test, Gary</u>	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.



Project Activity Lists con't

Set Filter Conditions & when to use Predecessor Status

Filter By Additional Fields (Opti	onal):			
Field	Operator	Va	alue	
Project Activity Name	✓ contains	✓ In	nstall	AND
Project Status	✓ equals	✓ A	ctive	AND
Туре	✓ equals	▼ A	ppointment	🕙 and
Completed	✓ equals	~		AND
Start	✓ not equal to	~]

Filter By Additional Fields (Optic Field	onal): 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.



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]								
Version and the second	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 h	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)						
	\$3,60 <mark>0.00</mark>	\$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.



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 诊 \$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

Vew Project Costs						
Action	Project Cost ID	Туре	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



Report on Projects and Activities

Most common Production Out-of-the-Box Reports



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

Range	
Current CY	~
From	То
1/1/2024	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: <u>How to change a Report Grouping</u>

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



Complete the Project in improveit 360

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

Project Activitie	s							
Project Template 📀 <u>All Projects Template</u> Project Start Date 📀 1/3/2023								
					Project	Completed Date 📀		
Action	Project Activity Name	Assigned To	Туре	Due	Start	End	Completed	Comments
<u>lit Del</u>	Permits		Task	1/3/2023			1/4/2023	Collect Permit #, Dig Date and log Project Cost for permitting
lit <u>Del</u>	Engineering		Task	1/3/2023			1/5/2023	
<u>it Del</u>	<u>Utilities</u>	Office Staff	Task	1/20/2023			1/20/2023	
t <u>Del</u>	Confirmation	Confirmer	Task	1/20/2023			1/20/2023	
Del Resend	Installation	<u>Rusty</u> Bennett	Appointment		1/30/2023 8:00 AM	1/30/2023 4:00 PM	1/30/2023	_
Del	QA Call		Task	1/31/2023				
<u>Del</u>	Documentation Review	Office Staff	Task	1/31/2023				Record all Project Costs at this time.
Del	Inventory		Task	1/31/2023				
Del	Invoicing	Accounting	Task	1/31/2023				

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

on rs!

jects eted



Final the Sale in improveit 360

Commission Details			
Sales Rep 1 🥝	Andrew Bernard	Sale	es Rep 2
Commission Rule	10% Over/Under	Commissi	ion Rule 🥥 🖳
Rep 1 Commission Amount 📀	31,023.50	Rep 2 Commission	Amount 🥝 \$0.00
Commission Basis Onn-Commissionable Amount	9,000.00 0.00	Rep Save and Calculate	• Split %
Sale Status			
W N P. Fi	Sold 12/20 Net Net 12/23 Paid 0n 12/23 Paid 10 12/23 In Full Paid 1/6/21 On 0n 1/6/21 Final 0n 1/6/21 On 0n 1/6/21	1/2022 [1/31/2023] 3/2022 [1/31/2023] 023 [1/31/2023] (1/31/2023]	Status Detail Cancel Sale

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

- Admins Use the Help Bot within your system: Click Get in Touch
- 2. Open a Ticket at: <u>https://support.improveit360.com/</u>
- 3. Or Email Us: <u>support@improveit360.com</u>

Support Office Hours:

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





Thanks for Attending

