PROJECTMAKER

info@ProjectMaker.com **www.ProjectMaker.com**

Take the Tour

Employees
Begin by making a new record for yourself. Be sure to give yourself a login name and password as well as enable all Roles on the Roles Tab. The next time you login as yourself, you will have Administrator access to all records.
Payroll- Note the time card entries
Evaluations- Check back here to see each Account Exec's work for a given time period.
Check out the skills section. The skills that appear here are set by you in the Preferences section (GO> Preferences) A snapshot of a person's skills is available from Labor scheduling.

Menus - using the "GO" menu try moving from file to file. Notice that "File", Edit" and "Go" remain constant as you move about and that the next menu will change to reflect the name of the file you are currently in and the commands available beneath it will change to reflect that file. Go back to Projects. Notice where you can't go using "GO". Equipment and Labor are the 2 files that you will use the most. You must access them from the Project that you are working on.
From The Projects List click on "Show All".
Click on the More button to get an overview of times, venues, trucking, subs and purchases, for this set of Projects then click on the "Lookup Party" Project 1100. Under the "Projects" menu try choosing "Call Sheet" and "Pull Sheet"
Equipment - Click on the equipment button and try sorting the various columns by clicking on them. Notice the status and S/P sorts. Click on the conflict button to view the conflict.
Tabs
Click the different tabs to see various aspects of this project.
Documents - Notice the different types of documents that are available. Click on them to view. Also note the direct link to a remote document such as an attached bar code list.

Financial - For this project, the client agreed on the initial proposal and later added more as evidenced by the change order. All blue underlined text is clickable. try clicking on the proposal, after viewing the proposal, the "view as" button will instantly reconfigure this proposal to be either Detailed or Summarized. Also click on the change order and Invoice.

Profit - The projected and actual labor differed a bit. The actual hours worked for this job were captured by entering hours worked on the Employees timecard for that payroll period. Incidental expenses also affected the bottom line. The Sub-rental and Purchase labels are clickable links that will take you to a list of them for closer examination.

Companies- Using the GO Menu jump over to Companies.
click on a company name and click through the tabs.

Inventory
While you're on the reports section try the Rental Catalog button.

Barcode-
Barcoding gives you greater over your inventory by allowing you to serialize your inventory. The barcode label is scanned when equipment is checked out or in. Numerous equipment reports are built in.
By default barcoding is turned on. If you don't currently anticipate needing this feature use the "Go" Menu to "Company Prefs." and uncheck "Enable Barcoding". We can supply compatible barcode labels for your inventory as well.

Tasks - Bookeeper- Choose the report "Completed Jobs with un-invoiced amounts" and click on the blue Project link.

Now Jump In!

Make a new project- Go back to Projects and from any window, click on the New Project Button. (for step by step new project instructions click here

After creating your first project click on the Equipment button and add some equipment use the lookup code "up1" for the up-lighting kit. Maybe specify a quantity of 3 and then click on the red Kit button. Choose to not show prices.

Click on the Labor button back in Projects. Make some labor entries

Make a new Employee (you!)

GO to the Employees file and click on the "New" button. Be sure to specify a ProjectMaker password for yourself so that the next time you open the file you can use your name and password. Go to the roles tab and give yourself all roles as well. This both allows you to perform certain functions and puts your name on various list throughout the program.

Making a New Project (step by step)

Step 1- Press the "New Project" button (third in from the top left).

Step 2- Select "Project type" from the drop down menu. For this demo, select "Production"

- Click the continue button in the grey field to the left. This will bring up red bullets for required data fields. (These required fields will vary depending on the type of project selected).

Step 3- Name your project "Demo Event"

Step 4- Click or tab into the Account Exec field and select "Demo User".

Step 5- Enter dates for your project. You can click the "17" calendar icon to use the calendar pop up window or click into the field next to it and enter the dates. There's no need to enter the year if your event will take place in the present calendar year, just type 3/1 for March 1st 2004. Tab through and enter the dates of the leave shop, install, strike and return fields. Projects may be up to 191 days in length.

Step 6- Select or create a Customer. You may select from a list of all the company's customers. You can search this list. Click into the search window, enter a name and press the "Show" button, or click the "Mine" button to select from a list of customers assigned to you (in this case, customers assigned to "demo user").

- You can create a new customer by pressing the "New" button. Name the new customer "Demo Company" and enter name and address information. *The grey arrow between the "Billing" and "Delivery" fields will copy the information from "Billing" to "Delivery". There are four assignable fields for phone numbers. Email, web links and a follow up field with calendar pop up are also available.
- When you are finished click "Create" and you will return to the Create Project layout.

Step 7- Select or create a Venue (Shipping address). A drop down list of your venues and shipping addresses is available if you click on the grey triangle or click into the field next to "Venue". As this list grows, you can narrow your search by typing in the first letter of the venue you're looking for.

- You can create a new venue by clicking the "New" button. When creating a new venue, enter in the venue name and address. You must include the zip code when entering a new venue. When you enter a zip code, ProjectMaker automatically looks up the corresponding city and state. It also looks up the tax rate for the city in which the venue is located and assigns a delivery rate based on the distance from your shop.
- When you have finished click "Create" and you return to the Create Project layout.

Step 8- OPTIONAL - ProjectMaker allows you to import the equipment and labor data from existing projects (handy when a client calls and requests a production that was "the same as last year"). Again, you can select from a list of all of the company's projects, narrow it down to your own projects or search for a project based on the name, venue or client. You can also choose to import just the equipment or just the labor of the project. This is a great way to set up "template projects" of shows for specific venues or packages that you frequently use that can be imported to drastically cut down on the amount data entry within the new project. For this demo, do not import.

Step 9- Click the "Create" button in the "Action" Field. This will create the project file and bring you to Main Project Information layout.

- This is a good time to request your delivery vehicles and equipment packaging methods. These are drop down windows located beneath the venue information. You can also select crew appearance requirements and assign labor contracts if you are using union labor. The equipment discount fields are located on this page as well.

Step 10- Select Times for your project. Click the "Lens" icon in the upper left hand corner of the Dates and Times area. This brings you to the Modify Dates and Times layout.
- You can enter times by clicking the clock icons to use the time pop up window or click into the fields next to them and enter the times (time defaults to AM so you can simply type 9 then press tab to enter 9am. For PM, just type 9pm then tab to the next field). The ":01" marks default times that ProjectMaker enters when creating the project. You should update these times if they don't apply to your project.
- When complete, click the continue button to return to the main project information layout.

Step 11- Enter an equipment list.
- Click on the grey "Equipment" button (next to the profit tab). ProjectMaker will ask if you want to create a new equipment entry. Click on the "yes" button. This will take you to the Equipment List layout.
- Click into the field below the "Area" heading and enter an area name (this is for creating proposals that use area descriptions). For this demo, call it "Pipe and Base".
- In the field under the "item code" heading, enter "pb1" which is the code for a pipe and base kit. The item codes are searchable by clicking on the grey triangle (left of the item code field).
- Next, enter in a quantity for the kit. For this demo, enter "4".
- Now, click the red "K" button. Click the "Include Kit" button in the pop up window and watch ProjectMaker import the items for this kit (these kits can save a lot of data entry time).
- Next, click the "verify all" button (top right corner) to check for conflicts with existing jobs. If there were a conflict, the buttons that say "OK" would say "conflict". Clicking on the "conflict" button would give you a list of all the projects these items were assigned to. You can then return to the equipment list and exchange the conflicting items or, click on the "Magnifying Lens" icon to assign a sub-rental or create a purchase order directly from the inventory line item.
- In this Equipment Detail layout you can create a description for the Area Heading of "Pipe and base". Click into the description field and type "ground support for lighting."
- When finished, click the Blue "Demo Event" link at the top of the page to return to the Main Project Information layout.

Step 12- Labor requests and scheduling…
- Press the grey "Labor" button (next to the "equipment" button). Click the "yes" button in the pop up window.
- A new record will be created and a drop down window will open with a list of call descriptions. For this demo select "Setup". It imports the install date and a drop down list of meeting places appears. Select "Onsite".
- Next, the position list opens. Select "Project Manager" (Notice, an hourly rate appears that is associated with the position type).
- Now, enter in the call time information by tabbing or clicking into the "in" and "out" fields.
- Finally, enter the hours to be billed under the "hours" heading. (Clicking into the field under the "type" heading will let you change the call to a "day rate" with pricing based on the day rate of the position). This is enough information to create a proposal and book a project.
- When the time comes to schedule this call, click the "scheduling" button at the top of the window. By clicking into the small field under the "employee" heading, you will be able to select from a list of your employees. For this demo, select "Demo User" as the employee.
- When you have confirmed this call with the employee, click the 'Confirm" button next to the employee's name. This will reserve this employee for this call. If you try to assign them to another project, a warning window will pop up alerting you to the conflict, with the name of the conflicting project.
- After the project is complete, click on the "Bill vs. Pay" button at the top of the window. This field allows you to enter in the actual hours worked for the project (which is needed for profit reporting). For this demo, match the paid hours to the billed hours.
- When finished, click the Blue "Demo Event" link at the top of the page to return to the main project information layout.

Step 13- Proposals. Now that the equipment and labor information is complete, it's time to send off a proposal to the client.
- To create a proposal; click on the "Financial" tab between the "Documents" and "Profit" tabs.
- Click on the "+" icon next to "Proposal". You are now in the Create New Proposal layout. You can select from a Summarized Proposal (just area heading and price), a Standard ProjectMaker Proposal (area heading with description and price), or a Detailed Proposal (itemized list of equipment). You can also select whether to include the company logo or not (useful if you're printing on company stationary). You can

choose to use the shipping or billing address, whether to include a default labor disclaimer or add a comment to the proposal.
• When finished, click the "create proposal" button. You are now in the Preview layout. Click the "continue" button on the left to continue. You can now choose to print the proposal or email it (the emailing feature is disabled in this demo version).
• When finished, click the "projects" button to return to the Financial tab of the Main Project Information layout.

Step 14- Changing the status of the project.
• After you send out the proposal, you will either change the "bid" into a "job" or cancel it if you lost the bid.
• This is done by clicking on the "change status" button at the top of the window. You will be given a choice as to canceling the project or turning it into a "job". For this demo, select the job button and choose yes when it asks if you're sure.
• At this time, ProjectMaker will re-verify all of the equipment and reserve it for this project. If some time has passed and you've booked projects since you sent out the proposal, you may have some conflicts to work out. You must resolve the conflicts for the project to be turned into a "job".

Step 15- Change Orders. During the life of a project, things are certain to change.
• When you create a proposal, you take a snap-shot of your equipment and labor information. You can see this in the Financial tab of the Main Project Information layout. As things change, the prices in the "current" heading will change accordingly.
• As the project develops, you can generate an unlimited number of change orders and choose what to charge for and what not to charge for.
• To create a change order, you must have some changes. For this demo, let's go to the Labor layout and add a new request for a driver call, assign a shop tech to the position for a four hour call (we can skip entering the time information).
• When finished, click the blue "Demo event" link to return to the financial layout. You will see a different total in the "labor" field under the "Current" heading.
• Click the "Change Orders" button. You will see a column to the right with the difference in the price of labor.
• Click on the arrow (next to price) to add to the change order.
• Then, click on the "New Change Order" button. Like the proposal, you can select logo preference, add a comment and choose an address. Click the "continue" button to proceed through the preview layout.
• Click the "Projects" button to return to the Financial Layout. It's a good idea to click the "current" tab next to the "Change Orders tab" (Leaving the Change Orders tab open slows things down a bit).

Step 16- Invoicing and Payments.
• To create an invoice, click on the "+" icon next to "invoices" in the financial tab of the Project Information layout.
• Choose your logo preference and invoice amount (you can override this amount if your client needs an invoice to pay deposits or if you need to settle on a fixed price) and click "continue".
• Continue through the preview layout and you can print the invoice for mailing or faxing.
• When finished, click the "projects" button to return to the financial tab of the project information layout.
• To enter payments into ProjectMaker, click on the "+" icon (next to "payments"). It will ask you if this is a security deposit. For this demo select "no". Click into the amount field and enter the total of the invoiced amount.

Step 17- Profit.

When the project has been paid if full, and the hours worked have been entered into the "bill vs. pay" labor area, click on the "profit" tab next to the "financial tab". Here you will see the projected profit area (useful during bidding) and the actual profit made on this project.

Thank you for evaluating this demo, we've only scratched the surface of what ProjectMaker can do. Please call us for a detailed walkthrough at (510) 644-2701
Thank you,
The ProjectMaker Development Team