Project Based Workflow

07/17/2025 9:38 am CDT

Overview

This article will review:

- Settings and Navigation
- Creating and Managing a Project
- Tracking and Visualizing Projects
- Project Invoicing Options
- FAQs

Watch a Project Management and Scheduling Webinar

Settings and Navigation

To configure invoicing for a project, go to **Control Panel > Services > Edit**, scroll to the **Invoicing** section, and set the **Invoicing Mode** to **Project Complete**. For more details, refer to Service Settings: Invoicing Mode.

| | Invoicing | |
|--------------------|-----------------------------------|----------------------|
| Finish Action | Default Action | |
| Invoicing Mode | ✓ Via Appointments | |
| | Proposal Accept | |
| | Project Complete | |
| voices Unapproved? | Manual | rated invoices as ur |
| Auto Invoice? | Via Appointments w/ Carry Forward | day of or Auto Invoi |

If these projects will usually involve appointments that span multiple days, go to **Control Panel > Proposals** and set the default appointment duration. This will cause all extra time over that amount to spill into a second appointment.

| osal Completion Mode | Invoiced or Appointments Completed V |
|----------------------|--|
| | Determine when a proposal is considered 100% complete. Car |
| Multi-day Duration? | 7 hours 30 min |
| | For multi-day scheduling, the default appointment duration |
| | Presentation |
| OL Tatal Balani Data | |

Creating and Managing a Project

Scheduling Appointments from a Proposal

1. Create the proposal.

- 2. Click the Schedule button at the top of the proposal to set up the first appointment.
- 3. If a proposal has only **one** appointment, it will not be considered a project.
- 4. Any proposal with **multiple** appointments automatically converts into a **Project** and appears in the **Projects Snapshot** until all appointments are finished and the proposal is complete.

Adding Additional Appointments

.

• To schedule additional appointments, go to the proposal and click **Add an Appointment** (blue bar at the bottom).

| | Example Ten | nplate - \$850 | Bundle new | | | | | | | | | | |
|---|--------------------|-----------------------------|----------------------------|--------------|----------------|-------------|---------|----------|----------|-----------|------|------------|----------|
| | ī | ltem | | Descrip | otion | | | | | Qty | | Rate | Amount |
| | | Step 2 | | Step 2 | | | | | | 1 | | 0.00 | \$250.00 |
| | | Example Part 1 | | Examp | le Part | 1 | | | | 2 | | 100.00 | \$200.00 |
| | | Example Part 2 | | Examp | le Part | 2 | | | | 2 | | 200.00 | \$400.00 |
| | | | | | | | | | | | | Subtotal | \$850.00 |
| 1 | | | | | | | | | | | | Tax | \$0.00 |
| | | | | | | | | | | | | Total | \$850.00 |
| | | | Send E | mail Cl | nange Drder | Add Deposit | Invoice | Add Appt | Add Task | Checklist | Copy | Open Issue | |
| Α | ppointments | | | | | | | | | | | | |
| € | Completed S | Step 2 on <u>Fri, Dec (</u> | <u>6, 2024 at 9:06a</u> w | vith Chuck V | /alls | | | | | | | | |
| | Completed S | Step 2 on <u>Fri, Dec (</u> | <u>6, 2024 at 12:27p</u> v | with Chuck V | Valls | | | | | | | | |
| L | <u>Attach appo</u> | intment | | | | | | | | | | | |

• All scheduled appointments will be listed at the bottom of the proposal.

Completing or Canceling a Project

- A project is marked **Complete** once all attached appointments are finished, and it will no longer appear in the Projects Snapshot.
- If a customer decides not to proceed, you can clear the acceptance to cancel the project.



Tracking and Visualizing Projects

Gantt Chart View

A gantt chart is a bar chart that illustrates a project schedule. Once a job has been designated as a Project, you can view a gantt chart directly from the proposal or from the Projects Grid snapshot. It provides a read-only visualization of project activities and their dependencies.

The Gantt button on the Projects Grid will show all projects at once.

| Recent Activity | | Proposals | | | | | | | | Filter All | Won Open Accepted Ur | schedulad Projects | Gar | | Actions |
|---------------------|---------|----------------------|------------|-----------|-----------------|-----------------------|------------|---------|------------|---------------|-------------------------------|--------------------|------------|------------------|----------|
| Snapshots | | Toposuis | | | | | | | | | | | | | |
| Pulse | | 25 👻 | | | | | | | | | | F | age 1 of 1 | l (18 items) 🛛 < | 1 of 1 |
| At a Glance | | Actions | Date 👻 | Status | Name | Service | Subtotal | Tax | Total | Accepted Date | Options | Title | Visits | Duration | Value |
| Open Invoices | 20 | | ۹ 🖬 | 1 | ۹ | ٩ | Q | Q | 익 1275 | ۹ 🖬 | | Q | Q | ۹ | ۹ |
| Unapproved Invoices | 4 | Q Schedule Print | 2/21/2025 | Invoiced | Fred Rogers | Test Service | \$800.00 | \$69.04 | \$869.04 | 2/21/2025 | Option A | Example Template | | 1 hour 20 mins | \$800.00 |
| Projects | 18 | Q Print | 2/21/2025 | Scheduled | Fred Rogers | Test Service | \$800.00 | \$69.04 | \$869.04 | 2/25/2025 | Option A | Example Template | | 1 hour 20 mins | \$800.00 |
| Open Proposals | 10 | Q Schedule Print | 2/13/2025 | Invoiced | Brooke Trout | Test Service | \$600.00 | \$0.00 | \$600.00 | 2/17/2025 | | | | 1 hour | \$600.00 |
| Backlog | \$0 / 0 | Q Print | 2/12/2025 | Invoiced | Wylie Coyote | Hammer all the things | \$383.00 | \$0.00 | \$383.00 | 2/12/2025 | Double Cabinet - Wall Mounted | | | 1 hour 50 mins | \$383.00 |
| | | Q Print | 12/6/2024 | Scheduled | Wylie Coyote | Step 2 | \$850.00 | \$0.00 | \$850.00 | 12/6/2024 | | Example Template | | 50 mins | \$850.00 |
| Expiring Service | 3 | Q Print | 12/6/2024 | Scheduled | Wylie Coyote | Step 1 | \$400.00 | \$0.00 | \$400.00 | 12/6/2024 | | | | 1 hour 10 mins | \$400.00 |
| Print Queue | 1 | Q Print | 11/27/2024 | Invoiced | Elsa Arendelle | Test Service | \$630.00 | \$54.37 | \$684.37 | 11/27/2024 | | Example Template | | 1 hour 20 mins | \$630.00 |
| Checklists | 22 | Q Print | 11/26/2024 | Scheduled | Stacey Fakename | Test Service | \$700.00 | \$17.26 | \$717.26 | 12/9/2024 | | Example Template | | 1 hour 20 mins | \$700.00 |
| Tasks | 19 | Q Print | 11/15/2024 | Invoiced | Jane Doe | Step 1 | \$400.00 | \$0.00 | \$400.00 | 2/21/2025 | | | | 30 mins | \$400.00 |
| Issues | 0 | Q Print | 11/13/2024 | Scheduled | Butch Cassidy | Test Service | \$100.00 | \$0.00 | \$100.00 | 11/13/2024 | | | | 1 hour | \$100.00 |
| | | • Io I I I Io I I | 10/00/0001 | | | 0 1 0 11 | A1 60 4 00 | ^^ ^^ | A1 00 / 00 | | | | | al 16 1 | A |

| Projects Gantt | | | | | | | | | |
|--|------------|------------|---------------------------|---------------------------|---------------------------|-------------------------|--------------------------|--|--|
| \odot \odot \approx \approx [] | | | | | | | | | |
| 7741- | 01-1 | Fed | August 2024 | | | | Ser | | |
| IItie | Start | End | Sun, 11 Aug – Sat, 17 Aug | Sun, 18 Aug – Sat, 24 Aug | Sun, 25 Aug – Sat, 31 Aug | Sun, 1 Sep – Sat, 7 Sep | Sun, 8 Sep - Sat, 14 Sep | | |
| Brooke Trout Test S | | | | Stacey Fakename | Test Service | | | | |
| Stacey Fakename T | 08/20/2024 | 08/21/2024 | | | | Bella Not | te Test Service | | |
| Bella Notte Test Ser | 09/05/2024 | 09/06/2024 | | | | | | | |
| ③ Dennis Mitchell Bat | 10/28/2024 | 10/29/2024 | | | | | | | |
| Bathroom Install | 10/28/2024 | 10/29/2024 | | | | | | | |

The Gantt button on a project proposal will show all appointments related to that one proposal.

| Pro | posal | | View | Gantt Edit Se | ttings Unsubscribe (| Complete Delete | Timeline |
|---|---|-------------------------|---------------------------|----------------------|----------------------------|--|---|
| Fred R 4802 E S Austin, T (143) 143 Sout Delivery Confirm En Route Copy Lir | logers 5th St. 1X 78702 3-1432 h Austin 4 Email to beautifulday@bemyneight 7 Email to beautifulday@bemyn antion Email to beautifulday@bemyn e nk | bor.com neighbor.com | | 1 | | St Proposal Accepted Da Rescindable Next Selected O Duration in | atus Scheduled ID 41671246 wner Katie H a Date 2/21/2025 te 2/25/2025 a Until 3/11/2025 Reminder <u>None</u> ptions Option A n 1 hour 20 mins voicing Manual |
| Exa | mple Template - \$800 | Bundle new | | | | | |
| 17 | Option | ltem | Description | | Qty | Rate | Amount |
| | | Test Service | Sample description of ser | vice. | 1 | 100.00 | \$100.00 |
| | | Example Part 1 | Example Part 1 | | 2 | 100.00 | \$200.00 |
| | Proposal Gantt | | | | | | |
| | @ @ ☆ ∀ [] | | | | | | |
| | Title | Start | End | Sup 22 Eak Oak 1 Mar | Cup 2 Mars Cat 8 Mars | March | 2025 |
| | Fred Rogers Test Service | 02/26/2025 | 03/01/2025 | Fred Roge | rs Test Service | Sun, a Mar - San, la Mar | |
| | Test Service | 02/26/2025 | 02/27/2025 | Egon Spengler | 2 | | |
| | Test Service | 02/27/2025 | 02/28/2025 | Egon Spe | Service Ingler | | |
| | Test Service | 02/28/2025 | 03/01/2025 | → □ Pete | Test Service rr Venkman | | |
| | | | | | | | |

Disabling Project Tracking

If you do **not** want to track a proposal as a project, you can turn this off by viewing the Proposal and clicking **Settings** at the top of the page. This will open up a set of options for this individual proposal. Uncheck the Project box to stop tracking it as a project.

| Proposal Settings | |
|----------------------------|--|
| Project? | Track as project |
| Invoicing Mode | Manual V |
| Summarize Pricing | Summarize pricing |
| Extra Signature | Allow for an extra signature to be taken when the contact accepts this proposal online |
| Capture Additional Deposit | |
| | This proposal has already been accepted, but you can set an extra deposit percentage here to allow the contact to apply a new deposit online |
| Target Date | |

Project Invoicing Options

If you plan to collect payment for a project in installments, you have a couple of options.

1. Generate one invoice and use the Maximum Payment Amount setting to collect partial payments.

On the invoice, click **Settings** and enter a dollar amount in the **Total Payment Limit** box. If you enter something here (either a number/dollar amount or percentage of the **Max Amount**), then the customer will NOT be able to pay an amount higher than that limit. This is typically used when a business is taking "progress payments" on a job. **Max Amount** is merely the total of this invoice. It does NOT take into account payments already made.

| Settings for l | Settings for Invoice I386210043 for Fred Rogers | | | | | |
|---------------------|--|--|--|--|--|--|
| Contact | Fred Rogers 4802 E 5th St. Austin, TX 78702 Customer South Austin | | | | | |
| Invoice Date* | 2/25/2025 Delivery | | | | | |
| Email | beautifulday@bemyneighbor.com | | | | | |
| Customer Note | | | | | | |
| Job Number | | | | | | |
| Total Payment Limit | Max Amount: \$869.04 | | | | | |
| Invoice Terms | | | | | | |

For example, if the invoice total was \$1000.00, and the customer has already paid 10% (\$100.00), and you want to collect an additional \$100, then you would enter 20% or \$200.00 in the box. The customer-facing invoice view would say "Due now: \$100, Payments made: \$100, and Balance due: \$800."

| ltem | Description | | | Rate |
|----------------|--------------------------------|-----------------------|-------------|------------|
| Test Service | Sample description of service. | | | \$900.00 |
| Example Part 1 | Example Part 1 | | | |
| Example Part 2 | Example Part 2 | | | |
| Option A | | - | | \$100.00 |
| Example Part 3 | Example Part 3 | | | |
| | | | Subtotal | \$1,000.00 |
| | | | Тах | \$0.00 |
| | | | Total | \$1,000.00 |
| | | Check Pmt 2/25/2025 o | n 2/25/2025 | \$100.00 |
| | | E | Balance Due | \$900.00 |
| | | | Due Now | \$100.00 |

2. Generate multiple invoices for a set percentage, partial total, or certain line items of the proposal.

| Generate an Invoice | |
|---------------------|-----------------------------|
| Invoice Type | • Full |
| | O Select Lines |
| | O Percentage |
| | Progress between 1 and 100 |
| | Amount |
| | Amount between 1 and 800.00 |
| Invoice Date | |

FAQs

How do I close Invoices under Projects?

You can go to a proposal that's been accepted/invoiced/scheduled and there will be a **Complete** button at the top. This will change the status to Complete, which clears it out of the Projects grid. If appointments for that invoice or proposal are still in progress, they will be kept in an open state.

What are Visits on the Projects?

Visits are the number of appointments tied to the Proposal. This works best for Subscription Style Services where there is a set number of appointments for the service.

If your service is based on recurring - such as weekly or monthly - then the Visit number will not be accurate since it will be constantly updating. If you're business is based on recurring appointments, you should not be using the Projects Grid and we recommend using the Appointments Grid as your source of truth.

To learn more, please review Recurring Appointments.