##### Script of Projects Module

Welcome to our presentation on PanapnaTech Business Software's projects module.

1. **Add new project**

Initiating a new project in PanapnaTech is a straightforward procedure designed to enhance your task and project management efficiency within the system. Begin by navigating to the "Projects" section and selecting the "All Projects" subsection.

To create a new project, click on "New Project." Enter the project title, select the customer, provide a comprehensive description, and specify the start date and deadline. Once all crucial details have been input, save the project information to ensure seamless record-keeping and management.

The "Tasks" section is where you create, assign, and track individual task that are related to a project. Each task can have a title, description, due date, assigned team member, and status.

Users can add new tasks, mark them as complete, set priority levels, and attach files or comments to provide additional details. This section facilitates the granular management of project activities.

The "Time sheet" section allows you to record and track the time spent by team members on specific tasks within a project.

Users can log their work hours, add descriptions, and categorize time entries by task.

"Milestones" represent significant achievements or stages in a project. They serve as markers to track progress and indicate key points in the project timeline.

Users can create, edit, and manage milestones, associating them with specific tasks or deadlines.

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The "Files" section is a centralized repository for all project-related documents, ensuring easy access and collaboration.

Users can upload, share, and organize files within the project. This feature simplifies document management, encourages version control, and enhances collaboration among team members.

The "Tickets" section allows users to create and manage support or issue tickets associated with a project.

Users can submit tickets, assign them to team members, and track their resolution status. This feature streamlines communication regarding project-related challenges or requests for assistance.

The "Notes" section serves as a space for users to jot down important information, reminders, or observations related to the project.

Users can create and organize notes, providing a convenient way to capture thoughts, ideas, or noteworthy details that contribute to project knowledge and continuity.

The "Activity" section provides a chronological log of all actions and changes that occur within the project.

1. **Add new lead**

Creating a new leads is straightforward. First, go to the "Projects" section, navigate to "Preconstruction," and select "Leads".

Here you can view all leads, edit and create delete them.

Click on "New Lead". Select the status, source, and assigned personnel, and choose tags. Enter the name, position, email address, website, phone number, lead value, company, address, city, state, and select the country. Provide the zip code and select the default language. Type in the description.

Options include profile, tasks, attachments, reminders,marking profile, and managing and notes, activity logs.

We can convert the lead into an estimate by clicking the 'Create new estimate' button. Additionally, we can edit the profile, edit leads, print leads, and delete them.

### Add the Customer

Creating a "New Customer" is straightforward. First, go to the "Projects" section, navigate to "Preconstruction," and select "Customer."

You can view customer summaries and delete customer details on the dashboard.

Click on "Add New Customer." Enter the Company, VAT number, phone number, and website, and select customer roles, currency, and default language. Then, enter the address, city, state, zip code, and select the country.

Next, click on the "Billing & Shipping" section. Enter the billing address details: street, city, state, zip code, and select the country.

Similarly, in the "Billing & Shipping" section, enter the shipping address details: street, city, state, zip code, select country, and finally, click on the save button.

### Add the Proposals/Estimates

Creating a new estimate/proposal is straightforward. First, go to the "Projects" section, navigate to "Preconstruction," and select "Estimate and Proposal" in the top navbar to initiate a new one. Click on ' New Estimate and proposal' and you can generate an estimate and proposal for an existing client.

First Provide a subject heading, specify whether it's linked to a lead or customer, and select the lead. Set the validity period, decide on discounts, and assign the proposal.

You can create your Estimate for your clients with our default sample table, or you have the flexibility to create custom templates. By selecting the table name and adding items in the Estimate record, You have the flexibility to adjust the markup percentage according to your specific project requirements.

For further customization, utilize the "Add Custom Item" button. This allows you to include personalized items by specifying the item name, quantity, material, labor, and other cost values. This feature provides a comprehensive approach to meeting specific project needs.

"Introduce your proposal with a template. You can create templates or use existing ones, streamlining your process. Add your company's introduction, goals, objectives, and any relevant images. Templates ensure consistency and save time in crafting proposals. Now, let's take a look at what we've created."

"Review your proposal and save it. Generate a PDF to view the final document, ensuring everything aligns with your brand. When satisfied, send the proposal via email. The email template is pre-set, making communication seamless. Clients receive a link in the email to review and accept or decline the proposal."

Upon acceptance and digital signing by the client, the proposal seamlessly transforms into an agreement. This automated process allows for efficient tracking of your proposal, ensuring a streamlined and organized workflow.

"PanaPanaTech takes care of reminders, both for you and your client. Automated email reminders ensure smooth communication without being intrusive. Stay informed on the progress of your proposals, and let the system handle reminders, eliminating the need for manual follow-ups."

### Add an Inspections

Creating a new inspection is straightforward. First, go to the "Projects" section, navigation to "Job Management," and select "Inspections".

We can view and edit all inspections and delete them.

Click on 'Create New Inspection'. In the 'Details' section, select the project and inspection type, specify the inspection date and time, assign personnel, enter the inspection location, and choose the Inspection Status. Type in the description."

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### Check Punch lists

To Check punch lists, is straightforward. First, go to the "Projects" section, navigate to "Job Management," and select "Punch Lists".

We can view or delete "Punch List" items on the dashboard.

### Check Incidents

To Check Incidents, is straightforward. First, go to the "Projects" section, navigate to "Manpower," and select "Incidents".

We can view all incidents.