

Quick Start Guide to Using Customer Paradigm's Project Management System

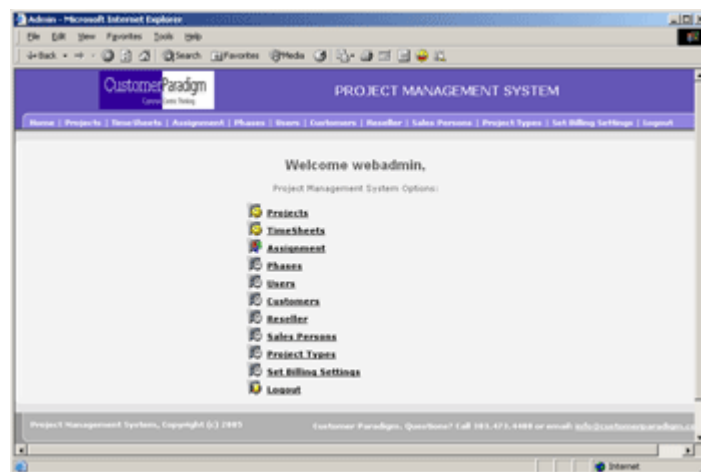
Introduction:

Customer Paradigm's Project Management System

Customer Paradigm's Project Management System is a full-featured project management system that is

ideal for keeping track of your company's projects.

We scoured the Web to find a solution that would work for our company, and found some that were extremely complex and expensive, while others didn't have the features that we needed (like tracking per-job profitability via integrated time sheets).



The system is very customizable (for example you can create your own project types and phases), and we can modify or expand the system to work within the framework of your company's business needs. If your company is at the point where it's not feasible to keep track of all of your projects in your head (along with documents, pricing, timesheets, etc), our system may be for you.

We use this system internally, and we've found that it has helped us avoid missing deadlines, keep better organized, and has allowed us to track projects and bill out more frequently. We've found that use of the system allows us to prevent forgetting to bill clients for work that has been completed (but wasn't communicated for some reason). Whether you are working in a single office, or you are spread across several states or countries, our web-based project management system allows multiple users to be able to interact efficiently.

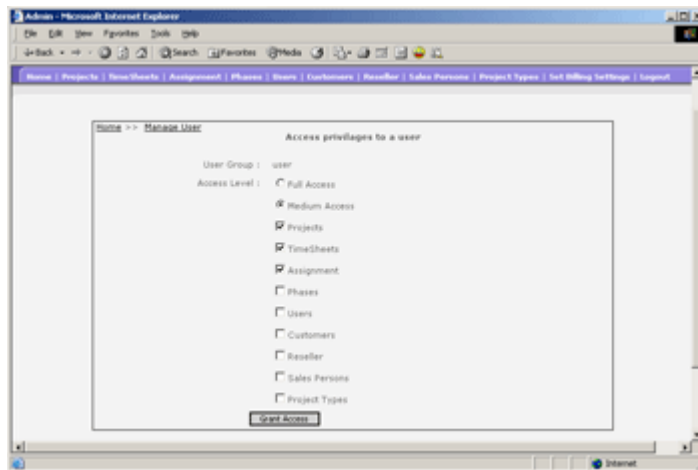


Quick Start Guide:

Multiple Users: You can create different users of the system with different access privileges.

Admin users have the ability to create other users, and view all information

Project Users have the ability to view projects in the system that have been assigned to them (You can also give each user the ability to view all projects, as well as view budget and billing information).



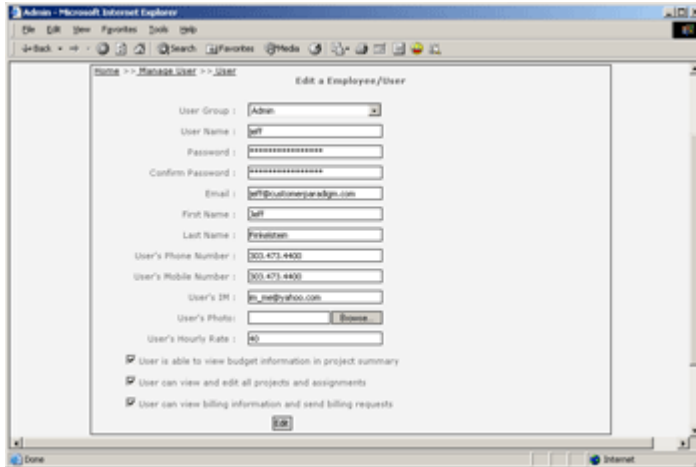
Sales Persons have the ability to view projects in the system that are assigned to them.

Sales people can be assigned a standard commission that will be used for all projects (although you can override this on a per-customer or per-project basis).

You can also assign a monthly quota and a commission floor (for example a dollar

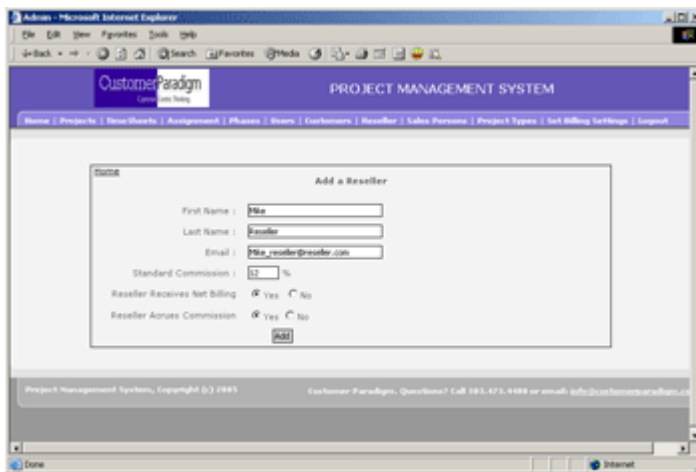


amount of sales before sales commissions start to kick in).



Resellers have the ability to view projects that they have referred to your company, and have been assigned to them as resellers.

Like sales people, a reseller can be set up in the system so that they can accrue commission at a set percentage for projects that they have referred to your company.



Customers can be given access to view the projects in the system that are assigned to them.

All users of the system can be assigned an hourly rate for billing purposes, and you are able to set preferences like:

User is able to view budget information in project summary

User can view and edit all projects and assignments



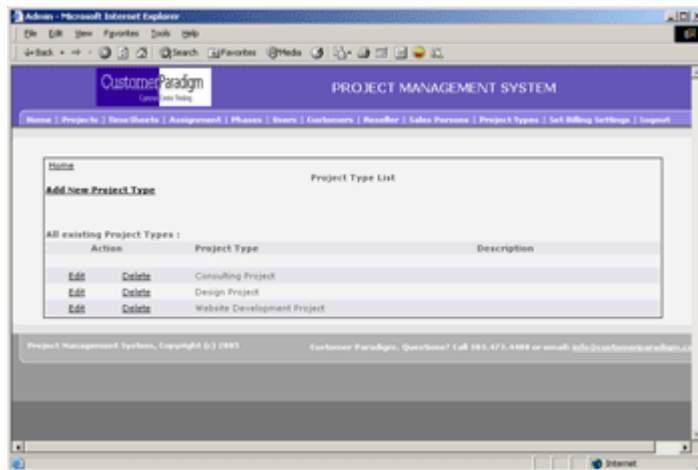
User can view billing information and send billing requests

Project Types: Projects vary by company, and the system allows you to customize the project types based on your company's needs.

The Customer Paradigm organization, for example, has a variety of projects that include php software, website design, and consulting services.

Within the system, you can create or edit different types of projects, all through the menu-driven interface.

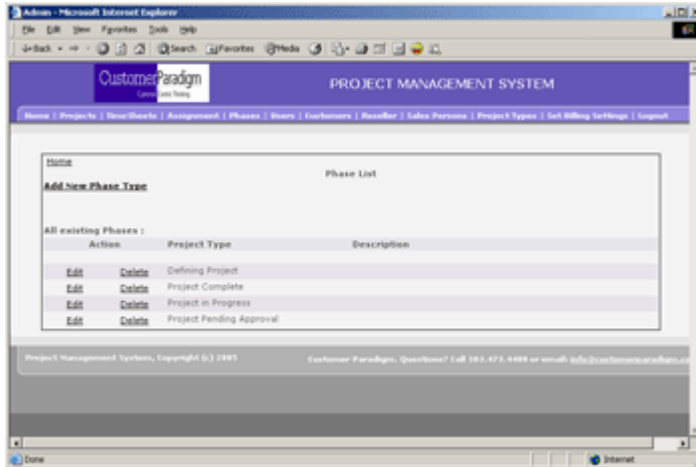
The project types can easily map to your existing bookkeeping system (i.e. QuickBooks).



Project Phases: Projects are typically divided into phases. You can add, edit or delete different phases according to the specific makeup of your company's business needs. Project phases might include: Customer Kickoff Meeting, Design,



Adding Content, Waiting for Client Approval, Testing, and Project Complete.

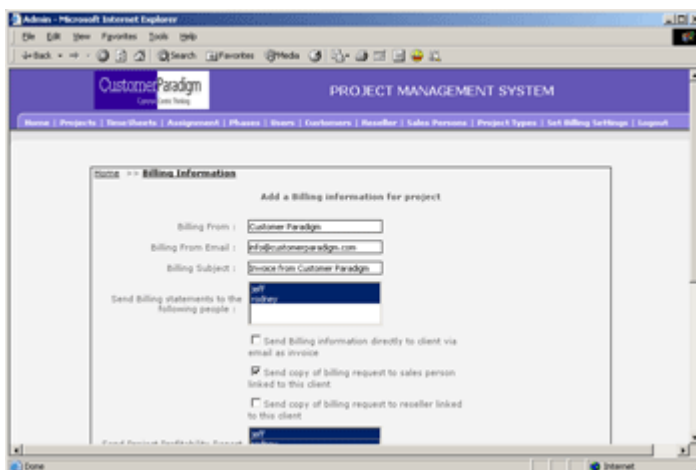


Set Billing Settings: The project management system allows you to set all of the billing information for your company in one handy view.

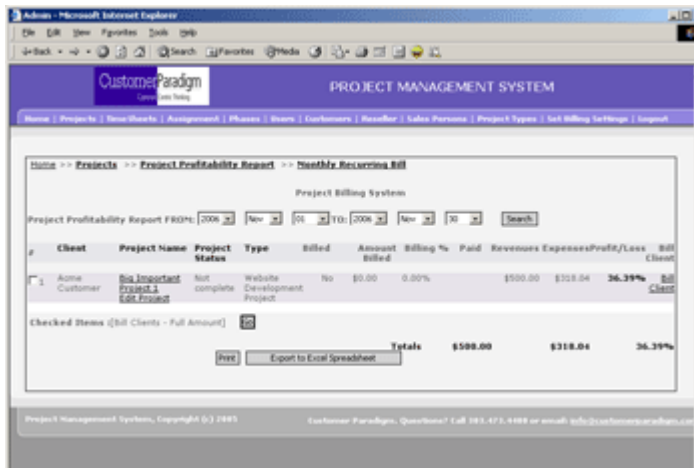
You can set the billing email address and subject line, and who receives statements. You can also set the billing payment address, URL, and other information.

You may want to not have the system send the bill directly to the client, but send it to your bookkeeper instead, so the system can be used as an internal system as well.

You have the option to copy the sales person and reseller linked to the account a copy of the billing statements when they are sent out.

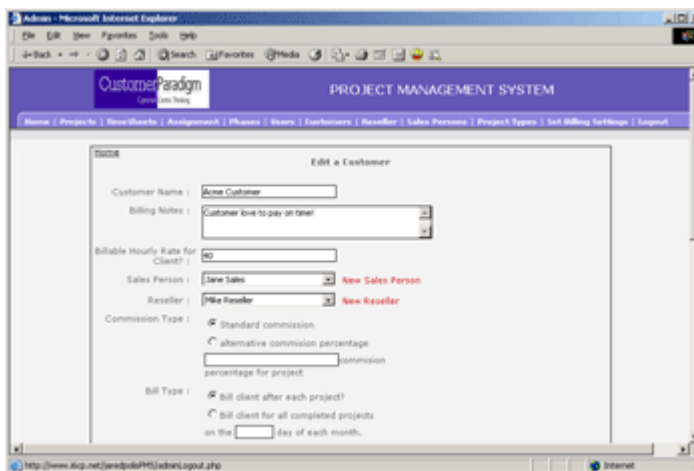


Project Profitability Reports: After each project is complete, you can have the project profitability report sent to one or more people. This report allows you to track profitability on a per-project basis. Even with QuickBooks, this is not an item to track.



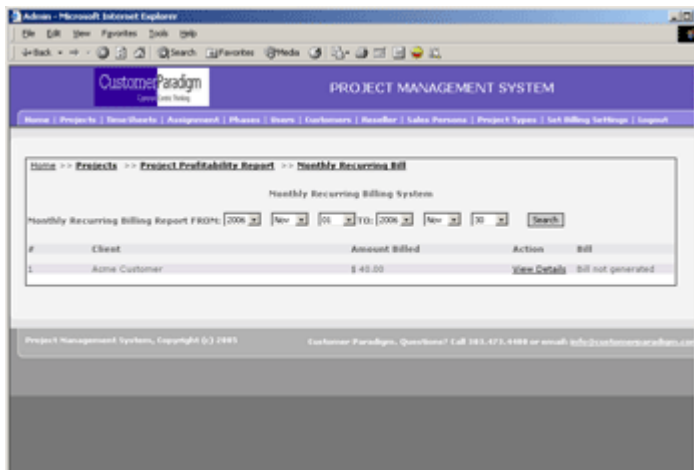
Customers: Each time you add a project, you need to assign it to one of your customers. Setting up a new project in the system, as well as creating a customer is a fast, two minute process.

The system allows you to enter in the customer's name, address, phone and fax information, as well as the billable hourly rate for the client (in case you are doing projects that are billed on an hourly basis).

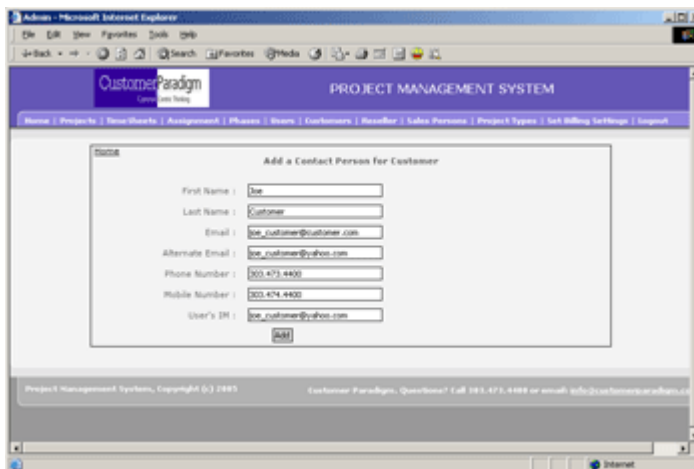


Each customer is assigned to a sales person and a reseller, and the system allows you to use the standard commission rate for this customer, or modify it at a different rate.

You can also assign monthly recurring revenue (for example: Website hosting or a monthly service fee), and this will be available in the system for you to view. No more 'forgetting' to bill clients for things that they've agreed to be charged for.



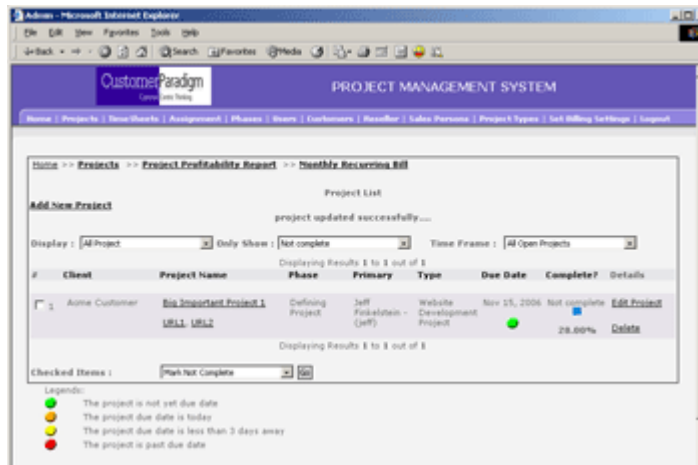
You can assign multiple contact people to a customer. We've found that having all of the information stored in one area makes it really easy for us to keep track of phone numbers, email addresses and other information.



Projects: The project interface is the heart of the system. All of the other data, including customer information, timesheets and more feed into the project view. The main project list displays all of the open projects in your organization.



This main list displays the dashboard of all of the projects that are open and not marked complete (although you can change this with drop down menus).



The Project List View shows the following information:

Client Name: the name of the customer for the project

Project Name: the name of the project, linked with the ability to drill down into the project details view

Phase: what phase the project is currently in (i.e. kickoff phase, on hold, design, waiting for customer). This is customized in the Phase area.

Primary Contact: this lists the primary person that is in charge of the project.

Project Type: The type of project (i.e. Website Design, software installation, consulting project)

Due Date: The system lists that date that the project is due, and displays a red, green or yellow circle that indicates if the project is on time (green), about to be overdue (yellow) or red (project is overdue).

% Complete: The project management system will display if the project is marked complete, as well as a percentage of completion. If a project is budgeted for 20 hours, and 5 hours have been added into timesheets for this project, the project will be displayed as 25% complete.

Bill Client: Depending on which user is viewing the project list, they can click on a link and bill the client automatically.



Edit Project: You can click to edit the project settings, including the project name, price and scope or due date.

Delete Project: You can delete a project in the system, if for example it is no longer a working project.

Add / Edit Project View: When you add a new project to the system, it's designed to be a quick, fast and easy process. The system is designed for companies that have several projects running at the same time, and don't need the complexity of running Microsoft Project for a 5 hour project. While people need to take weeklong training programs to learn how to use Microsoft's Project software, ours is intuitive and requires little if any training.

Project Name: Each project is given a name that describes the project

Customer: You can select the appropriate customer from the drop-down menu that the project will be assigned to.

Start Date: You can select a starting date for the project (by default it's set to the current date)

Due Date: You can set the date when the project is due (by default it's set to one week after the current date)

URLs: You can post up to three web links for the project where you can have people visit for more information. This might be the homepage of the customer's website, or the testing area.

Primary Contact: You can select the project owner from a drop-down list.

Secondary Contact: You can select one or more secondary contacts that will also have access to the project.

Project Price Settings: You can set the project so that it is priced on four different criteria:

Time and Materials: This project will be billed based on time spent

Hourly Project: Project price based on number of hours spent.

Fixed Price Project: Project is based on a fixed price.

Hourly + Fixed Price: Project price based on both hours + project



Billing Rate: You can use the standard billing rate for the client that was defined in their customer details, or you can set a rate that is higher or lower for this specific project.

Non-Commissionable Expenses: You can enter in a dollar amount for expenses that a sales person shouldn't receive a commission on. Printing, postage, travel expenses, etc can go in here.

Project Description & Notes: You can enter in a more detailed description of the project, as well as project notes.

Purchase Order Number: The system allows you to automatically enter in a purchase order (PO number) for the project, if your client has given one to you.

Billing Notes: Any specific billing notes that you want to appear on the invoice can be entered here.

Project Details View: The project details view is a snapshot of all of the important information about a project. It's an expanded view of the Project list view. The project details view is broken into the following sections:

Project Information: This includes the project name, project description and notes, as well as the URLs for the project.

Customer Info: This area displays the customer's name, sales person assigned to the account, and contacts for the client (phone and email).

Project Status: This shows the start and due date, the primary project lead, as well as the total number of worked hours (from the time sheet details). The system will display a list of the users and how many hours they have worked against the



project.

Project Information			
Project Name	Big Important Project 1	Url 1	http://www.sapedcreator.com/
		Url 2	http://www.sapedcreator.com/siteadmin/
		Url 3	
Description :	This is a test project...		
Notes :			
Customer Info			
Customer Name	Acme Customer	Contact Person Information	Add New Contact
		Contact Person	Email
		Joe Customer	jo_customer@customer.com
			Phone
			303.473.4400, 303.474.4400
Project Status			
Start Date	2006-04-30	Total Worked Hours	4.25 Hours
Due Date	2006-11-25	Total Budgeted Hours	15.00 Hours
Primary Contact	Jeff	Project Type	Website Development Project
Secondary Contact		Current phase	Defining Project
User Details	User	Hours	% completed
	Jeff	4.25	28.00%
Project Economic Status			
Project Budget	\$ 500.00	Reseller Expense	\$ 48.00

Project Economic Status: This shows the current profitability of the project.

Project Budget / Revenues: This area shows the project budget (calculated from when the project was added). If it's a fixed price, the fixed price is listed in the project budget line. If it's based on 15 hours at a certain billable rate, that total price will be listed in the project budget line.

Project Expenses: The system will calculate the project expenses from the time sheets, as well as other non-commissionable expenses.

Project Overhead: In the billing section, you can select a standard overhead for project profitability calculations. A typical overhead rate is 20%; this covers normal office supplies, rent, insurance and other items that aren't directly billable, but should be accounted for.

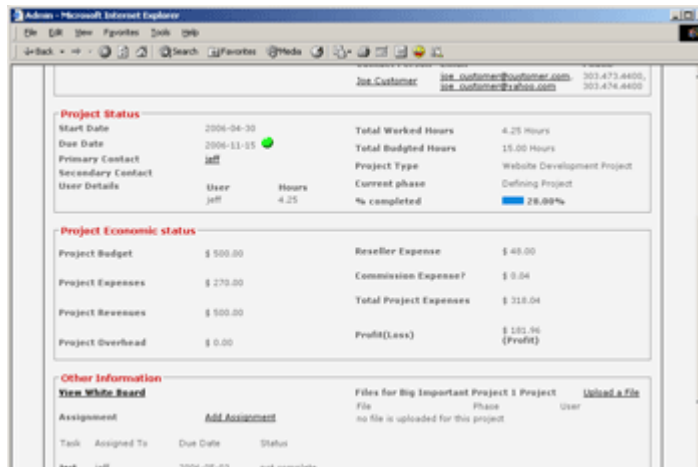
Reseller Expense: The system will calculate reseller expenses for referrals.

Commission Expense: The system will calculate the commission that is due for the sales person for the project.

Total Project Expenses: The system totals all of the project expenses.

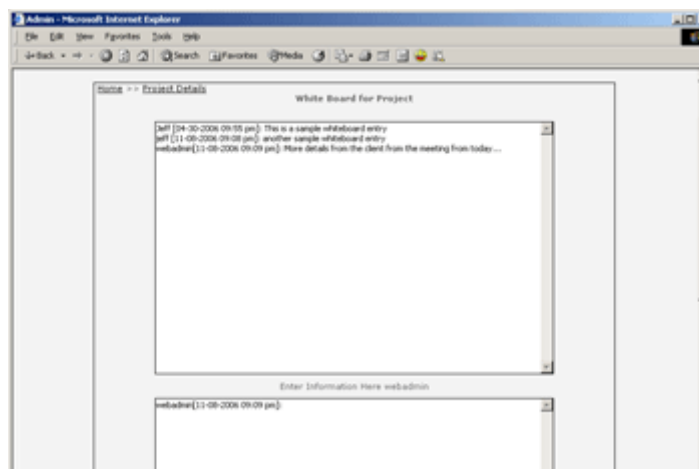


Profit or Loss: The system then creates an up-to-the minute, real-time report of the profit or loss for the project.



The screenshot shows a web browser window displaying a project management interface. The page is titled "Joe Customer" and includes contact information. It features several sections: "Project Status" with fields for Start Date (2006-04-30), Due Date (2006-11-15), Primary Contact (jeff), and Secondary Contact (jeff). It also shows Total Worked Hours (4.25), Total Budgeted Hours (15.00), Project Type (Website Development Project), Current phase (Defining Project), and % completed (28.00%). The "Project Economic status" section includes Project Budget (\$500.00), Project Expenses (\$270.00), Project Revenues (\$500.00), Project Overhead (\$0.00), Reseller Expense (\$40.00), Commission Expense? (\$0.04), Total Project Expenses (\$318.04), and Profit(Loss) (\$182.96 (Profit)). The "Other Information" section includes a "View White Board" link and a table for "Files for Big Important Project 1 Project".

Whiteboard System: The project management system includes a whiteboard, where any users with access to the system can post notes, comments or status updates. We've found this is a great way to communicate when people are working out of different offices, or are working from



home.

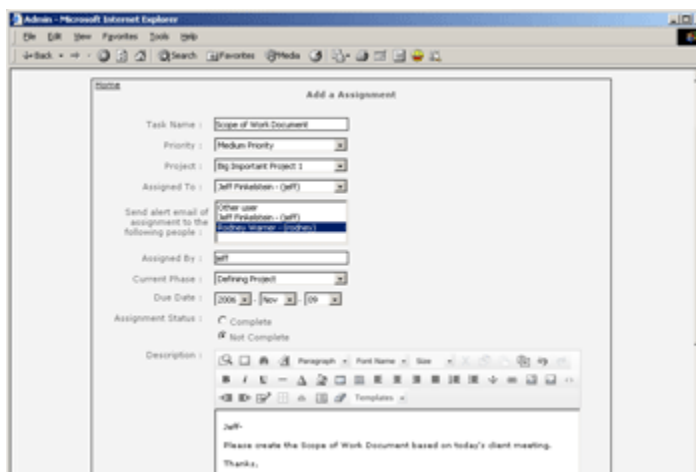
File Manager: The system allows a project user to be able to upload documents to the system, that are then available to be viewed by anyone with access to the project. Scope of work documents, PDFs or Powerpoints are added to the system with comments.



Assignment System: From the project details view, you can look at all of the assignments that are outstanding or completed. Or, you can generate a new assignment that will be sent to another member of the team.

The assignment system is much better than stray emails sent out asking people to do things.

You can see what tasks have been assigned to which people, and if they are done. The assignment system has helped prevent tasks from being 'lost' and overdue.

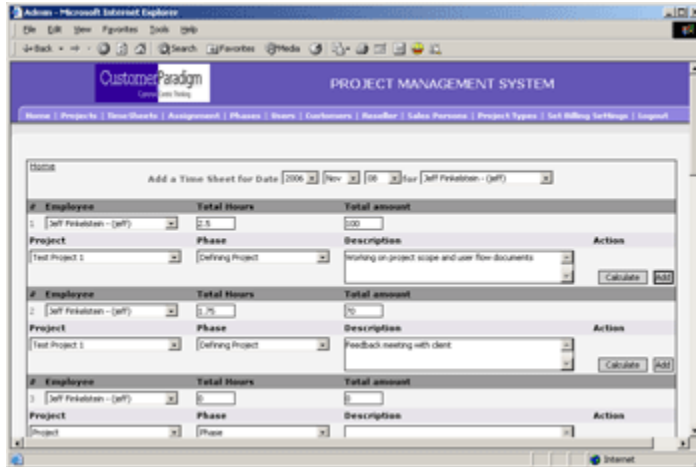


Project TimeSheet: The project time sheet allows a user with the proper access to be able to view all of the hours, timesheet and details for the project.

Time Sheets & Expenses: It's easy for contractors and employees to keep online timesheets that allow them to quickly enter their time against projects, or submit their expenses through the system and have the expenses count against specific projects. For the administrator, it's easy to generate a report for a specific employee



or contractor for selected date ranges, or even export into an Excel spreadsheet.



SOFTWARE REQUIREMENTS:

- php / mySQL database
- Linux system preferred, Windows server may require additional setup.

