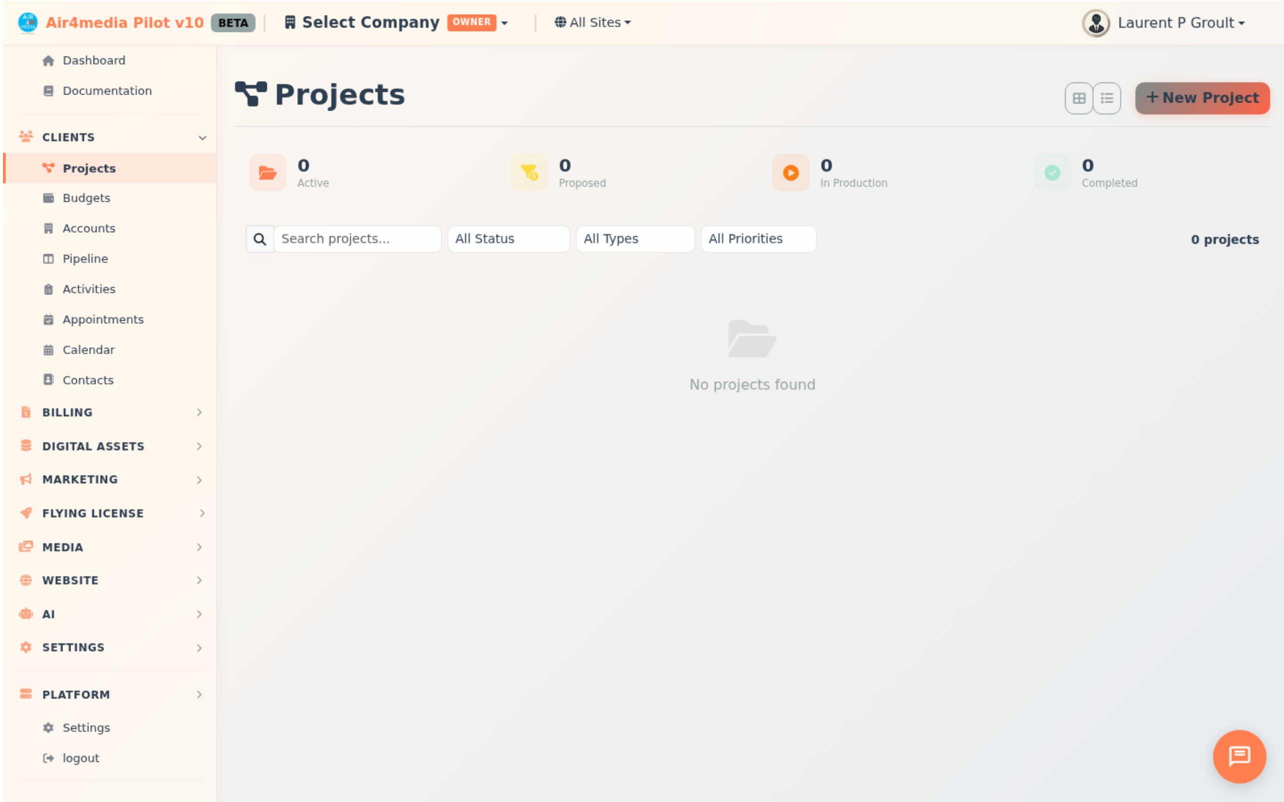

Projects

Manage all your projects and events in one place — from initial proposal to completed work. Track values, deadlines, venues, expenses, quotes, contracts, and invoices across your entire pipeline.

Key Features

- **Two Views**: Switch between a visual card grid (default) and a sortable list view
- **Clickable Stats**: Dashboard cards show Active, Proposed, In Production, and Completed project counts — click any card to instantly filter the view
- **Project Types**: Categorize work as Single Event, Multi-Day Event, Production, Rental, Service, Retainer, or Custom
- **Status Tracking**: Move projects through Proposed → Contracted → Planning → In Production → Completed (or On Hold / Cancelled)
- **Priority Levels**: Flag projects as Low, Normal, High, or Urgent
- **Payment Column**: The list view shows invoiced and paid amounts so you know where each project stands financially
- **Events**: Add individual event dates and times within a project (Ceremony, Reception, Rehearsal, Setup, Breakdown, Meeting, Performance, or Other)

- **Quotes**: Create and send quotes for a project; designate each as a primary quote or an option, and track status from Draft through Accepted
- **Documents**: Attach contracts, questionnaires, subcontracts, lead forms, and proposals — and generate invoices directly from signed contracts
- **Invoices & Payments**: View and create invoices tied to a project, and record payments directly (Stripe, PayPal, bank transfer, check, cash, Venmo, Zelle, or other)
- **Expense Tracking**: Log project expenses as Direct Expenses, Vendor Bills, or Resource Costs; categorize by equipment, labor, venue, travel, materials, subcontractor, software, insurance, or marketing; optionally link to a vendor and mark items as billable to the client
- **Budget**: Log project expenses (by type, category, and vendor); set annual revenue and expense targets; view a live profit/loss summary per project
- **Fullscreen Detail**: Expand any project detail panel to fullscreen for distraction-free review
- **Resources**: Assign team members or equipment to a project, track their confirmation status, and sync their costs to project expenses
- **Activity Log**: See a chronological record of actions taken on each project
- **Filtering**: Narrow results by status, project type, or priority in both card and list views
- **Search**: Find projects by name, description, venue name, or account name

How to Use

1. Click **New Project** to open the project form
2. On the **General** tab, enter the project name, linked account, type, status, priority, estimated value, primary contact, and description
3. On the **Dates & Venue** tab, set start date, end date, deadline, and venue details
4. On the **Notes** tab, add any internal notes
5. Click **Save Project** — the project appears in your card grid immediately
6. Click a project card (or the **eye icon** in list view) to open the full project detail panel, where you can manage:
    - **Events** — schedule specific dates and times within the project
    - **Quotes** — view linked quotes or create a new one; toggle any quote between primary and option roles
    - **Documents** — view contracts, questionnaires, subcontracts, lead forms, and proposals; generate an invoice directly from a signed contract
    - **Invoices** — view payment status, create a new invoice, or record a payment directly
    - **Resources** — see assigned team members or equipment and their confirmation status
    - **Activity** — review the full action history
    - **Budget** — log expenses by type and category; optionally link to a vendor and mark as

billable; set annual targets and see your live profit/loss

7. Switch to **List View** (list icon in the toolbar) to see all projects in a sortable table with payment columns and event counts

Tips

- Click any **stat card** at the top to instantly filter projects by that status — click again to clear the filter
- Use the **toolbar filters** to narrow by status, type, or priority without leaving the main view
- Mark expenses as **Billable** to flag costs that should be passed on to the client when invoicing
- Use **Sync Resource Costs** on the Resources tab to automatically pull assigned team or equipment costs into the Budget tab
- The **Budget** tab shows estimated value, contracted value, total expenses, amount paid, and a live profit/loss — review it before sending a final invoice
- Click the **expand icon** in the project detail header to open the panel in fullscreen mode
- Filter by **Urgent** priority to surface the projects that need immediate attention