# AXIOM QX Live Sheet User Manual

For builders running on the AXIOM QX Live Sheet — no Smartsheet required. Everything you need to set up and run your projects.

## 01 Sign Up & Log In

**STEP 1**

Open your browser. Go to **app.axiomqx.com**.

**STEP 2**

Click **Sign Up** in the top right corner.

**STEP 3**

Enter your **company email address**. This will be your login.

**STEP 4**

After you click **Sign Up**, AXIOM sends a verification code to your email. Go to your inbox, copy the 6-digit code, and enter it on screen. Once verified, you're in.

That's it. You're in. Next time you log in, you go straight to your dashboard.

## 02 Add Your Vendors & Suppliers

**Do this before anything else.** You need vendors in the system before you can assign them to your schedule.

**STEP 1**

Click **Vendors** in the left menu bar.

**STEP 2**

Click **+ Add Vendor** at the top right.

**STEP 3**

Fill in the fields:

📋 **For each vendor, enter:**

**Company Name** — the business name (e.g. "Smith Plumbing")

**Contact Name** — primary person you deal with

**Email** — their email address

**Phone** — main phone number

**STEP 4**

Click **Save**. The vendor appears in your list.

**STEP 5**

Repeat for every company you work with — plumber, electrician, framer, tile installer, lumber yard, roofing supplier. Everyone.

💡 Start with the 10-15 trades and suppliers you use the most. You can always add more later.

## 03 Add Your First Project

**STEP 1**

Click **Live Sheet** in the left menu bar.

**STEP 2**

Click **Select Project**.

**STEP 3**

Click **New Project**.

**STEP 4**

Fill in: Project Name, Address, Contact Name, Phone, Email. Click **Save**.

## 04 Build Your Schedule

This is where the real work happens. You're building your project schedule — every task, every trade, every deadline.

**STEP 1**

Click the **Schedule** tab on this page, or click **Schedule** in the left menu bar. Either one takes you there.

**STEP 2**

A pop-up appears asking you to choose a template. You can pick a blank template or a pre-set template. Start with **Demo Gantt**.

**STEP 3**

The template loads all the tasks for you. Go down the list row by row and fill in each column.

### Column-by-Column Guide

| COLUMN | HOW TO USE IT |
|---|---|
| **Task Name** | Read each task. If it applies to your project, keep it. If not, delete the row. Add any tasks that are missing. Put them in the order your project gets built — top to bottom. |
| **Duration** | Click the cell. Type the number of days this task takes. You know your jobs. Framing — 5 days. Plumbing — 3 days. Roofing — 2 days. Be honest, not optimistic. |
| **Start Date** | Click the cell for your FIRST task only. Pick the date work begins. Every other date calculates automatically from durations and predecessors. |
| **Predecessors** | Click the cell. Type the row number of the task that must finish before this one starts. Plumbing can't start until framing is done — so plumbing's predecessor is framing's row number. The schedule cascades automatically. |
| **Assigned To** | Click the cell. A dropdown appears showing your vendors. Select a sample vendor to see how assignments work. |
| **Show Schedule** | Check this box if you want the client to see this task on their portal. Leave it unchecked for internal tasks the client doesn't need to know about. |
| **Selection Required** | Check this box if the client needs to make a decision for this task — tile color, countertop material, paint color, light fixtures. When checked, AXIOM will track the deadline and send automatic alerts. |
| **Finalize By** | Click the cell. Pick the date you need the client's selection decision by. Give yourself 2-3 weeks of cushion before you actually need the material. This is the deadline AXIOM uses for selection alerts. |
| **Supplied By Owner** | Check this box if the client is buying and supplying the material themselves. Leave it unchecked if you're supplying it. This shows on the portal so the client knows who's responsible. |

### How the Gantt Works

Once you fill in your tasks, durations, start dates, and predecessors, the Gantt chart builds itself. Bars, dates, dependencies — all automatic.

**Move one task and everything downstream shifts.** Change a duration and end dates recalculate. Add a predecessor and the dependency chain updates. You never manually calculate a date.

💡 **The order matters:** Task Name → Duration → Start Date → Predecessors. Fill them in this order. Once predecessors are set, the entire schedule cascades automatically.

## 05 Payments & Documents

**STEP 1**

Click the **Project Data** tab on this page, or click **Live Sheet** in the left menu bar. Either one takes you to the same page.

### Payment Schedule

**STEP 2**

Scroll to the **Payment Schedule** section. Click **+ Add Row**.

**STEP 3**

Type the **description** — what this payment is for. Example: "Foundation Complete"

**STEP 4**

Tab to the next field. Type the **amount**. Example: 25000

**STEP 5**

Click the **status dropdown**. It starts as "Not Billed." Leave it. You'll change it later when you invoice.

**STEP 6**

Click **Save**. Repeat for every payment milestone in your contract.

💰 **Payment statuses — what they mean:**

**Not Billed** — you haven't invoiced yet (default)

**Billed** — you sent the invoice, waiting for payment

**Paid** — client paid, amount moves to Total Paid on the portal

The **contract price** calculates automatically from your payment rows. Your client sees this on their portal — total contract, total billed, total paid.

### Documents

**STEP 7**

Scroll to the **Documents** section.

**STEP 8**

Click **Upload** or drag and drop files onto the area. Upload your proposal, contract, architectural plans, permits, surveys — whatever you have right now.

Your client sees these on their portal with a **NEW** badge until they open them. You can add more documents at any time.

💡 At this point there are no change orders, no credits, and no client uploads. Those come later as the project runs. Right now you're just setting up the starting point.

## 06 Turn It On

**STEP 1**

Go to the **Project Data** tab or click **Live Sheet** in the left menu bar. Flip the **Portal** toggle on.

**STEP 2**

The toggle turns green and the button changes from **Inactive** to **Active**. The portal is now live.

**STEP 3**

Click **Copy URL**. This copies the portal link to your clipboard.

**STEP 4**

Send that link to your client by text or email along with their **4-digit PIN**. They open it on any phone, tablet, or computer. No app to download. No account to create. Just a link and a number.

**STEP 5**

Turn on the **Alert Toggle** for this project. AXIOM will now automatically email your client as selection deadlines approach.

**You're done.**

Your project is running. Your client has a portal. Your subs can see their assignments. Selection alerts fire automatically. Update progress from the job site using the Tracker — 20 tasks in 30 seconds.

Need another project? Copy the master template, rename the folder, AXIOM picks it up automatically. Unlimited projects. No extra fees.

## 07 The Tracker

The Tracker is how you update progress from the job site. Open it on your phone — it's designed for one-handed use while you're walking the project.

### How to Open It

**OPTION A**

Click **Tracker** in the left sidebar of the dashboard.

**OPTION B**

Go to **app.axiomqx.com/tracker** directly on your phone. Bookmark it.

### How to Update Tasks

**STEP 1**
Select your project from the dropdown at the top.

**STEP 2**
You see every task with a progress bar. **Tap a task** to expand it.

**STEP 3**
Drag the **percentage slider** or tap the percentage buttons (0%, 25%, 50%, 75%, 100%).

**STEP 4**
Tap the **Stage dots** to set the current stage.

**STEP 5**
Move to the next task. Tap, update, move on.

**STEP 6**
When you're done, tap **Save** at the bottom. One button sends every update at once.

**20 tasks in 30 seconds.** Walk the project, tap as you go, save when you're done.

### Stage Values — What They Mean

🔵 **Stage progression:**

**Not Started** — empty circle. No work has begun.

**Start Process** — quarter filled. Work is being prepared or scheduled.

**In Progress** — half filled. Work is actively underway.

**Material Ordered** — three quarter filled. Materials ordered or in transit.

**Del./On-Site** — fully filled. Task is complete or materials delivered on site.

💡 When you save, your client portal, sub portals, and dashboard all update in real time. One save updates everything everywhere.

## 08 What Your Client Sees

When your client opens their portal link and enters their PIN, they see the following sections. This is what they're looking at — so you know what they're asking about when they call.

### KPI Cards (Top of Page)

Four numbers across the top: **Contract Price**, **Total Billed**, **Total Paid**, and **Balance Due**. These calculate automatically from your payment schedule. When you change a payment status to Billed or Paid, these numbers update on the portal instantly.

### Milestones / Schedule

Every task where you checked **Show Schedule** appears here with a progress bar. Tasks with a stage of Del./On-Site show a green **ON SITE** badge. Your client can see what's done, what's in progress, and what's coming up — without calling you.

### Selections

Every task where you checked **Selection Required** appears here. The client sees the item name, the deadline, and a status. When they make their selection, they click the **Confirm** button. Overdue selections show a red alert. This is what drives the automated email alerts.

### Documents

Every file you uploaded shows here. New documents have a **NEW** badge that disappears after the client opens them. They click to view the document in a new tab. Upload more anytime from your Project Data screen and they appear instantly.

### Change Orders

When you add a change order from Project Data, it appears here with the description, amount, and status. The client reviews it and can **sign with their finger** (on phone) or mouse (on desktop) to approve. The signature is saved and timestamped.

### Credits

Any credits you apply show here with description and amount. Credits subtract from the contract price.

### Notices

Any announcements you post — weather delays, schedule changes, holiday closures — show here. Post them from Project Data and they appear on the portal immediately.

> 💡 Your client doesn't need an app, a login, or an account. Just the link and their 4-digit PIN. Works on any phone, tablet, or computer. Any browser.

## 09 Sub & Supplier Portals

Your subs and suppliers get their own portal showing every task assigned to them across **all** of your projects. They don't need an account — just a link.

### How to Deploy a Sub Portal

**STEP 1**

Click **Subs** in the left sidebar.

**STEP 2**

Find the sub in your list. Click **Deploy** next to their name.

**STEP 3**

AXIOM sends them an email with their portal link. They click it and they're in. No login. No account.

### What Subs See

**Their portal shows:**

**Task Name** — every task they're assigned to, across all your projects

**Stage** — current status with a colored dot and label (Not Started, In Progress, etc.)

**Del. Date** — when the task is scheduled

**Progress** — percentage complete bar

### Suppliers Can Update Stage

Suppliers (not regular subs) can change the stage from their portal. When they mark an item as **Ordered** or **On-Site**, it updates your schedule automatically. No phone call needed.

### Kill Switch

⚠ If you need to revoke a sub's access, click **Kill** next to their name. Their link stops working immediately. Click **Reinstate** to restore access — the same link works again.

## 10 Adding More Projects

**STEP 1**

Go to your **Axiom Templates** workspace.

**STEP 2**

Copy the master template sheets into a **new folder**.

**STEP 3**

Rename the folder to your project name (e.g. "Smith Kitchen Remodel").

**STEP 4**

Go back to AXIOM. Open the project dropdown. Your new project is already there.

That's it. No calling support. No extra fees. No limits. Copy, rename, done.

Never edit the master templates directly. Always copy first, then edit the copy. Keep the masters clean.

## 11 Automated Selection Alerts

When you check **Selection Required** on a task and set a **Finalize By** date, AXIOM takes over. It checks every day and sends the right email at the right time. You don't have to do anything.

### The 5-Tier Alert System

🔔 **How the alerts escalate:**

**7 days before deadline** — friendly reminder email to the client. "Your selection for Kitchen Tile is due in 7 days."

**3 days before deadline** — urgent reminder email to the client. Tone shifts — "This needs your attention."

**1 day overdue** — alert email to the client. "You are past due on this selection."

**3 days overdue** — alert email to **both** the client AND you (the builder). Now you both know.

**5+ days overdue** — alert to both. The project gets flagged as **delayed** in your dashboard.

💡 Alerts fire automatically every day. You never chase a selection again. If a client is 5 days overdue, you already know — and they already know you know.

## 12 Weekly Reports

Every week, AXIOM sends your client an **email summary** of their project:

📧 **What's in the weekly report:**

**Milestones completed** this week

**Upcoming work** scheduled for next week

**Selection status** — what's on track, what's overdue

**Payment summary** — what's been billed, what's been paid

Automatic. No action needed from you. Your client gets a professional update every week without you writing a single email.

## 13 Common Questions

### How do I add another project?

Go to your **Axiom Templates** workspace. Copy the master template into a new folder. Rename the folder to your project name. Go back to AXIOM — it's already in your dropdown. See Section 10.

### My client forgot their PIN.

Go to **Projects**. Click on the project. You'll see the PIN on screen. Text it to them again. If you want to change it, click **Reset PIN** and a new one is generated.

### How do I add a change order?

Go to **Project Data** for the project. Scroll to the **Change Orders** section. Click **+ Add Row**. Enter the description, amount, and status. Click **Save**. It appears on the client portal immediately. The client can sign to approve it right from their phone.

### How do I add a credit?

Same as a change order. Go to **Project Data**, scroll to **Credits**, click **+ Add Row**, enter description and amount, save. Credits subtract from the contract price automatically.

### How do I update a payment status?

Go to **Project Data**. Find the payment row. Click the **status dropdown**. Change it from Not Billed to **Billed** when you send the invoice. Change it to **Paid** when the client pays. The portal updates instantly — Total Billed and Total Paid recalculate automatically.

### How do I upload more documents?

Go to **Project Data**. Scroll to **Documents**. Click **Upload** or drag and drop. The file appears on the client portal immediately with a **NEW** badge.

### Can my client upload documents to me?

Yes. Clients can upload files through their portal. You'll see them in the Documents section of Project Data.

### How do I post a notice to my client?

Go to **Project Data**. Scroll to **Notices**. Click **+ Add Row**. Type your notice — weather delay, schedule change, holiday closure, anything. Save. It appears on the portal immediately.

### How do I revoke a sub's portal access?

Go to **Subs**. Find the sub. Click **Kill**. Their link stops working instantly. Click **Reinstate** anytime to restore it.

### How do I update progress from the job site?

Open the **Tracker** on your phone. Select your project. Tap each task, set the percentage and stage, hit **Save**. Everything updates — portal, dashboard, sub portals. See Section 07.

### Do my clients need to download an app?

No. The portal is a website. They open the link in any browser on any device. No app, no account, no login. Just a link and a 4-digit PIN.

### Do my subs need a Smartsheet account?

No. Subs and suppliers don't need any account. They click the link you deploy to them and they see their assignments. That's it.

### What happens if I cancel AXIOM?

You keep everything. Zero data custody. All your project data stays yours. You just lose the portals and the automated alerts. Your data is yours forever.

### How do selection alerts work?

When you check **Selection Required** and set a **Finalize By** date, AXIOM sends automatic emails as the deadline approaches. 5 tiers — from a friendly reminder 7 days out to a delayed flag at 5 days overdue. See Section 11.

### Can I turn alerts off for a specific project?

Yes. Go to **Projects**. Find the project. Turn off the **Alert Toggle**. Alerts stop. Turn it back on anytime.

### How long does it take to set up my first project?

About 20 minutes. Follow Sections 01 through 06 in this manual. By the end, your client has a live portal on their phone.

### I need help. Who do I contact?

Email **support@axiomqx.com**. Training videos are at **axiomqx.com/training**.