



Smartsheet User Manual

Connect Smartsheet, build your Gantt, run projects with AXIOM QX.

S M A R T S H E E T U S E R M A N U A L

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Sign Up & Connect Smartsheet

STEP 1

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

STEP 2

Click **Sign Up**. Enter your company email - use the same email as your Smartsheet account. Create a password. Turn on two-factor authentication.

STEP 3

You'll see the onboarding screen with two buttons. Click **Connect Smartsheet**. A popup opens - this is Smartsheet asking you to authorize AXIOM to read your project data. Click **Allow**.

STEP 4

Click **Deploy Templates**. AXIOM builds your workspace and starter projects inside your Smartsheet account. Takes about 15 seconds.

STEP 5

Both buttons show green checkmarks. You're connected. Next login goes straight to your dashboard.



If the Smartsheet popup doesn't appear, allow popups for app.axiomqx.com in your browser settings. This is the #1 issue on setup.



You need a Smartsheet Pro plan (\$9/month) or higher. The free plan doesn't support API access. If you don't have Smartsheet yet, go to smartsheet.com and start a free 30-day trial first.

Your Workspace

When you clicked Deploy Templates, AXIOM created two workspaces in your Smartsheet:

AXIOM QX (TOP WORKSPACE)

This is where your active projects live. Inside it you'll see 3 project folders - Project 1, Project 2, Project 3. Each folder has two sheets: a **Gantt sheet** (your schedule) and a **Client Portal sheet** (payments, documents, change orders). The project dropdown in AXIOM reads from this workspace.

AXIOM TEMPLATES (BELOW)

This is your master library. It contains clean template copies of the Gantt and Client Portal sheets. **Never edit these directly.** When you need a new project, you copy from here. If you ever mess up a sheet, you can copy a fresh one from Templates.

Two Sheets Per Project

Every project folder has exactly two sheets:

Inside each project folder:

Gantt Sheet - your project schedule. Tasks, milestones, durations, predecessors, selections, sub assignments. AXIOM identifies it by the Task Name + Start Date columns.

Client Portal Sheet - payments, documents, change orders, credits, notices, client uploads. AXIOM identifies it because it does NOT have Task Name + Start Date columns.



AXIOM identifies which sheet is which by column structure, not by name. You can rename the sheets anything you want - AXIOM will still find them.

The Gantt Sheet

Open Smartsheet. Go to your AXIOM QX workspace. Open a project folder. Click on the Gantt sheet. This is where you build your schedule.

STEP 1

Go to the **Task Name** column. 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 build order - top to bottom.

STEP 2

Go to the **Duration** column. For each task, type the number of days it takes. Framing - 5 days. Plumbing - 3 days. Roofing - 2 days.

STEP 3

Go to the **Start Date** column. Click the cell for your FIRST task only. Pick the date work begins. Smartsheet calculates every other date from durations and predecessors.

STEP 4

Go to the **Predecessors** column. For each task, type the row number of the task that must finish before this one starts. Example: if Plumbing is row 8 and it can't start until Framing (row 5) is done, type **5** in Plumbing's Predecessors cell.

STEP 5

Go to the **Assigned To** column. Type the email address of the sub or supplier who's doing this task. This is what feeds the sub portal - their tasks appear automatically.

All Gantt Columns

COLUMN	HOW TO USE IT
Task Name	The name of each task, in build order. Parent rows are phases (Foundation, Framing). Child rows are individual tasks underneath.
Duration	Number of days this task takes. Smartsheet calculates the end date.
Start Date	Set only the first task's start date. Everything else calculates from predecessors.
End Date	Calculated automatically. Don't type here - it fills in from Start Date + Duration.
Predecessors	Row number of the task that must finish first. Creates the dependency chain.

Assigned To	Email address of the sub/supplier. Feeds the sub portal and tracker.
% Done	Progress percentage (0-100). Updated from the Tracker or directly in Smartsheet.
Stage	Status tracking: Quarter (Start Process), Half (In Progress), Three Quarter (Ordered), Full (Complete/On-Site).
Show Schedule	Checkbox. Check = client sees this task on their portal. Uncheck = internal only.
Selection Required	Checkbox. Check = client needs to make a decision. Triggers selection tracking and alerts.
Finalize By	Date. When you need the client's selection decision. Drives the 5-tier alert system.
Supplied By Owner	Checkbox. Checked = client supplies the material. Unchecked = you supply it.
On Site	Checkbox. Checked = shows green ON SITE badge on the client portal.
Comments	Free text notes. Displayed on the portal for each task.

How the Gantt Chart Works

Once you fill in Task Name, Duration, Start Date, and Predecessors, the Gantt chart builds itself in Smartsheet. You'll see bars, dependencies, and a visual timeline.

Move one task and everything downstream shifts. Change a duration and end dates recalculate. Add a predecessor and the dependency chain updates. AXIOM reads this data in real time - your portal and dashboard always reflect the latest schedule.



Work in Smartsheet, not in AXIOM. The Gantt sheet is your source of truth. Edit tasks, dates, and assignments directly in Smartsheet. AXIOM reads from it - it never writes to your Gantt (except the Tracker, which updates % Done and Stage).

The Client Portal Sheet

Open the second sheet in your project folder - the Client Portal sheet. This is where payments, documents, change orders, credits, and notices live.

The sheet is organized by section numbers in Column 1. Each section has a specific purpose:

SECTION	WHAT IT HOLDS	WHICH COLUMNS TO USE
Section 1	Documents	Column 3 = description. Attach files directly to each row using Smartsheet's attachment feature.
Section 2	Payment Schedule	Col 3 = milestone name. Col 5 = amount. Col 6 = date. Col 7 = status (Not Billed / Billed / Paid).
Section 3	Change Orders	Col 3 = description. Col 5 = amount. Col 6 = date. Col 7 = status (Pending / Approved / Not Doing).
Section 4	Credits	Col 3 = description. Col 5 = amount. Col 6 = date. Col 7 = status.
Section 5	Pricing Required	Col 6 = date.
Section 6	Notices	Col 2 = visibility checkbox. Col 3 = notice text. Col 6 = date.
Section 7	Client Uploads	Col 3 = selection name. Col 6 = date. Client uploads files through the portal.

How to Add a Payment Milestone

STEP 1

Find Section 2 in the sheet (look for "2" in Column 1).

STEP 2

Add a new row under Section 2. In **Column 3**, type the description - "Foundation Complete."

STEP 3

In **Column 5**, type the amount - 25000.

STEP 4

In **Column 6**, enter the date (optional).

STEP 5

In **Column 7**, type the status - start with "Not Billed." Change to "Billed" when you invoice. Change to "Paid" when the client pays.

How to Upload a Document

STEP 1

Find Section 1 in the sheet.

STEP 2

Add a new row. In **Column 3**, type the document name - "Architectural Plans."

STEP 3

Right-click the row. Click **Attachments**. Upload your file. The file attaches to that row and shows on the client portal.



Change orders, credits, and notices follow the same pattern - add a row in the right section, fill in the columns. The portal reads it instantly.

Add a Client in AXIOM

STEP 1

Go to **app.axiomqx.com**. Click **Clients** in the sidebar.

STEP 2

Click **+ New Client**. A dropdown appears showing every folder in your AXIOM QX Smartsheet workspace.

STEP 3

Select the project folder. AXIOM automatically finds the Gantt and Client Portal sheets inside it.

STEP 4

Enter the client's **name**, **address**, **phone**, and **email**.

STEP 5

AXIOM generates a **4-digit PIN**. This is what your client types to access their portal.

STEP 6

Click **Deploy to Smartsheet**. Your client is connected.

Turn It On

STEP 1

In the Clients list, find your client. Flip the **Deploy Portal** toggle. It turns green.

STEP 2

Click **Copy URL**. The portal link is on your clipboard.

STEP 3

Text or email the link to your client with their **4-digit PIN**. They open it on any device. No app. No account.

STEP 4

Turn on the **Alert Toggle**. AXIOM starts sending automatic selection reminder emails.

You're done. Your project is running. Everything your client sees on the portal comes directly from your Smartsheet. Update your Smartsheet and the portal updates automatically. Use the Tracker from your phone to update progress on the job site.

The Tracker

The Tracker updates your Smartsheet Gantt from your phone. Open it on the job site, update tasks as you walk the project, hit Save - it writes directly back to Smartsheet.

STEP 1

Click **Tracker** in the sidebar, or go to app.axiomqx.com/tracker on your phone.

STEP 2

Select your project from the dropdown.

STEP 3

Tap a task to expand it. Set the **percentage** and **stage**.

STEP 4

Move to the next task. Tap, update, move on.

STEP 5

Tap **Save to Smartsheet**. One button writes every update back to your Smartsheet Gantt in one batch.

20 tasks in 30 seconds. The % Done and Stage columns in Smartsheet update instantly. Your portal, dashboard, and sub portals all reflect the changes.

Stage values:

Not Started - empty. No work begun.

Quarter - Start Process. Work being prepared.

Half - In Progress. Work underway.

Three Quarter - Material Ordered. Materials in transit.

Full - Del./On-Site. Complete or delivered.



The Tracker is the only part of AXIOM that writes to your Smartsheet. Everything else is read-only. Your Smartsheet is always the source of truth.

What Your Client Sees

Your client opens the portal link and enters their PIN. Everything they see comes directly from your Smartsheet - the Gantt sheet feeds the schedule, the Client Portal sheet feeds payments and documents.

KPI Cards

Contract Price, Total Billed, Total Paid, Balance Due. Calculated from your Payment Schedule rows in the Client Portal sheet.

Milestones

Every task where **Show Schedule** is checked in your Gantt. Progress bars, On-Site badges, start and end dates.

Selections

Every task where **Selection Required** is checked. Status, Finalize By deadline, and action buttons. Overdue items show red alerts.

Documents

Files attached to Section 1 rows in the Client Portal sheet. **NEW** badges on documents the client hasn't opened.

Change Orders

Section 3 rows. Client sees description, amount, and can **sign with their finger** to approve.

Credits

Section 4 rows. Description and amount. Subtracts from contract price.

Notices

Section 6 rows where the visibility checkbox is checked.

Client Uploads

Section 7. Clients can upload documents through the portal. Files attach to your Smartsheet automatically.



Update your Smartsheet and the portal updates instantly. Add a payment row, upload a document, check a box - the client sees it immediately.

Sub & Supplier Portals

Any email address in the **Assigned To** column of your Gantt sheet automatically appears in your Subs list. Their tasks show up across all your projects.

STEP 1

Click **Subs** in the sidebar. You'll see every email from your Assigned To columns.

STEP 2

Click **Deploy** next to a sub's name. AXIOM sends them an email with their portal link.

Subs see their task name, stage, delivery date, and progress across all your projects. Suppliers can update stage (Ordered, On-Site) directly from their portal.



Kill Switch: Click **Kill** to revoke access instantly. Click **Reinstate** to restore it.

Adding More Projects

STEP 1

Go to Smartsheet. Open the **Axiom Templates** workspace.

STEP 2

Right-click the master Gantt sheet. Click **Save as New**. Choose your **AXIOM QX** workspace. Create a **new folder** with your project name. Save.

STEP 3

Do the same for the master Client Portal sheet - save it into the same new folder.

STEP 4

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

No extra fees. No calling support. No limits. Copy, rename, done.



Never edit the master templates in Axiom Templates. Always copy first. If you mess up a sheet, copy a fresh one.

Automated Selection Alerts

When you check **Selection Required** and set a **Finalize By** date in your Gantt sheet, AXIOM sends automatic emails as the deadline approaches.

 **5-tier alert system:**

7 days before - friendly reminder to the client

3 days before - urgent reminder to the client

1 day overdue - alert to the client

3 days overdue - alert to both client AND builder

5+ days overdue - alert to both, project flagged delayed



Alerts fire automatically every day. You never chase a selection again.

Weekly Reports

Every week, AXIOM emails your client a summary - milestones completed, upcoming work, selection status, payment summary. Automatic. No action needed.

Common Questions

How do I add another project?

Go to Axiom Templates in Smartsheet. Copy the master sheets into a new folder in your AXIOM QX workspace. AXIOM sees it automatically.

My client forgot their PIN.

Go to **Clients** in AXIOM. Click the client. The PIN is on screen. Text it again, or click **Reset PIN** for a new one.

How do I add a change order?

Go to the Client Portal sheet in Smartsheet. Find Section 3. Add a row. Column 3 = description, Column 5 = amount, Column 6 = date, Column 7 = status (Pending). The client sees it on their portal and can sign to approve.

How do I add a credit?

Same as a change order but in Section 4. Add a row with description, amount, date, status. Credits subtract from the contract price.

How do I update a payment status?

Go to Section 2 in the Client Portal sheet. Find the payment row. Change **Column 7** from "Not Billed" to "Billed" or "Paid." The portal updates instantly.

How do I upload a document?

Go to Section 1 in the Client Portal sheet. Add a row with the document name. Right-click the row, click Attachments, upload the file. It appears on the client portal with a NEW badge.

Do I edit in Smartsheet or AXIOM?

Edit your **schedule** (tasks, dates, assignments) in **Smartsheet**. Edit your **clients** (portal toggle, PIN, client info) in **AXIOM**. The Tracker updates both from your phone.

Can my client upload documents?

Yes. Clients upload through their portal. Files attach to Section 7 in your Client Portal sheet automatically.

How do I revoke a sub's access?

Go to Subs in AXIOM. Click **Kill**. Instant. Click **Reinstate** to bring them back.

Do my clients need an app?

No. The portal is a website. Any browser, any device. Link + PIN.

Do my subs need Smartsheet?

No. Subs click their portal link. No Smartsheet account, no AXIOM account. Just a link.

What happens if I cancel AXIOM?

You keep everything. All your project data stays in your Smartsheet. It was always yours. You just lose the portals and automated alerts.

How long does setup take?

About 20 minutes for your first project. Follow Sections 01 through 06.

I need help.

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