AXIOM QX

Getting Started

From sign-in to a running job, step by step. For the builder, the office, the super, the homeowner, the subs and the suppliers. November 2026.

AXIOM QX works on top of your Smartsheet. You build the job's schedule in Smartsheet the way you always have. AXIOM reads it and gives everyone else their own window into it: the homeowner, your subs, your suppliers and your super. Everything that is not a date, the money, the change orders, the documents, the notices, you run from one page in AXIOM called Project Control, and AXIOM writes it to the job's data sheet for you.

PART 1. THE BUILDER: YOUR FIRST DAY

1. Start your trial

1. Go to axiomqx.com and press **Start your 30-day trial**.
2. Enter your name, company, email and phone. A secure Stripe page then takes the card. Nothing is charged today; the first charge is on day 31 unless you cancel first. If AXIOM QX gave you an invitation code, type it in the code box and the Stripe page asks for no card.
3. You land on a page that says you're set, and a welcome email arrives. Open the link in it and finish the short sign-up, and you are in. Your 30 days started at the checkout.
4. Sign in from then on at app.axiomqx.com.

2. The welcome panel

The first time you sign in, a panel opens with the three things to do, each with its own button: Connect your Smartsheet, Build your template, Start a project. Until all three are done, a START HERE block sits under Health on every page so you can pick up where you left off.

3. Connect your Smartsheet

1. **Settings** → **Smartsheet connection** → **Connect Smartsheet** (or the button on the welcome panel).
2. Smartsheet opens and asks if AXIOM QX may access your account. Press Allow.
3. You are back in AXIOM. Settings shows Connected.

> No Smartsheet yet? Get a Smartsheet Business account first (smartsheet.com). AXIOM needs it; it is where your jobs live. Only the account owner connects; your office staff sign in with their own emails and use the same connection.

4. Build your template

1. **Settings** → **Build my template** (or the welcome panel button). Press it.
2. Wait about 30 seconds. A checklist runs. When it says Template built, you are done.
3. Open your Smartsheet. You now have a workspace called **AXIOM QX** with a folder called TEMPLATE in it holding two sheets: the schedule (the Gantt) and the client data sheet.
4. The first time you open a sheet, Smartsheet shows it in Grid view. Switch to Gantt once (the view button at the top); Smartsheet remembers after that.

Leave the template folder alone for now. Every job you build is a copy of it. You can tune the template later (Part 3), but build your first job first.

5. Add your subs and suppliers

Do this before the first job, so the names are ready to pick in the Gantt.

1. **Subs & Vendors** → **Add a sub or vendor**.
2. Company (or New company), Sub or Vendor, a line about what they do, then the people: name, position, email, phone. Add another for the next person at the same company.
3. Tick "Turn their portals on now" if you want each person's portal link and PIN emailed now; you can do it later.
4. Save. AXIOM puts each person, name and email, on the Assigned To list of your template and every active job. You never type a name into Smartsheet.

> Already have people in your Gantts from before AXIOM? They show on Subs & Vendors automatically. Press Edit on one to file them under their company and add a phone.

6. Build your first job

1. **New Project**.
2. Type the job name (the client's last name and street, like "Burns Residence · 14 Oak St").
3. Client 1: name, phone, email. Client 2 if there is one.
4. Property: address, town, block, lot, permit number.
5. Press **Build Project**. Wait a few seconds.
6. The job appears on Home. In your Smartsheet, under AXIOM QX, there is a new folder with the job's name and two sheets inside, the schedule and the client data sheet. Your client's information is already in the data sheet, and the first row of the Gantt is a locked link, Open this job in AXIOM QX, that takes you back.

7. After the trial

1. Your 30 days start the day you sign up. Before they end you get emails saying when, and what happens next.

2. With a card on file, nothing to do: $399 a month from day 31, unlimited users and unlimited jobs. **Settings** → **Billing** → **Manage billing** opens your Stripe page: invoices, change the card, cancel at the end of the period.
3. Signed up with an invitation code and no card? On day 31 the account pauses and every portal goes dark until a card is added from the same Billing card. Add it and everything is back the same minute, exactly as you left it.
4. Either way, nothing in your Smartsheet is touched. Every schedule, document and payment record is yours and stays where it is.

PART 2. THE BUILDER: BUILD THE GANTT, THEN RUN THE DATA SHEET

Open the job's schedule sheet in Smartsheet. It is already full of line items from the template, grouped under section headers. Work through it in this order, one column at a time. Steps 1 to 9 are the same nine steps on the Quick Start. How long it takes depends on the job: 30 minutes for a bath, an hour or two for an addition, a morning for a custom home. Project Control after it is 15 minutes to an hour.

Step 1. Lines: make the task list yours

The template is a baseline, not a rule. Everybody builds differently.

1. Delete the tasks this job does not have, or that you never do.
2. Add the tasks you do that are not there. Right-click a row → Insert Row. Put them in the order you build.
3. If you are a pro with your own sequence, delete every line and build the list your way. AXIOM does not care what the tasks are called or how many there are.
4. Section headers (the bold parent rows) roll up the dates underneath them. Keep them, rename them, add your own. A row whose name starts with ** is a heading too, and never shows as a task.
5. Name a delivery "Del" or "Delivery" and assign it to the supplier; AXIOM lists it under Deliveries on This Week instead of Tasks.

> The one rule: never add, remove or rename a column. The columns are how AXIOM reads the sheet. Rows are yours; columns are not. Leave the locked first row alone.

Step 2. Assigned To: who does it

1. In the Assigned To column, press the cell and pick the sub or supplier from the list. The list is the people you saved in Subs & Vendors (Part 1, step 5).
2. Someone missing? Add them in Subs & Vendors, not here. Save puts them on the list of every job at once. Typing a bare email in the cell works, but then AXIOM has to be told the name later.

3. A task can carry more than one person from the same company; each sees it on their own portal.

Step 3. Durations

1. In the Duration column, type the working days for each task: 1d, 3d, 10d. Look at each one on its own.
2. Leave section headers blank; they add themselves up. Weekends are skipped automatically.

Step 4. First start date

1. Type the Start Date on the first task only (permit, demo, excavation, whatever comes first).
2. Do not type start dates on anything else. The predecessors do that.

Step 5. Predecessors

1. In the Predecessors column, type the row number of the task that must finish before this one starts. Framing starts after foundation: put the foundation's row number.
2. More than one: separate with commas (12, 15).
3. Overlap: 14FS-2d means start two days before row 14 finishes. Lag: 14FS+3d means three days after.
4. As you type them, every Start and End Date fills in by itself. Change one duration and the whole chain moves.

> Work top to bottom. Most tasks depend on the one right above them. When you reach the end, the last row's End Date is your completion date.

Step 6. Show Schedule: what the client sees

1. Check Show Schedule on the lines you want the homeowner to see: usually the section headers (Foundation, Framing, Roof, Rough-ins, Drywall, Finishes, Punch list) and a few big dates.
2. Do not check every line. Ten to twenty milestones is right. The client sees a clean schedule, not your whole sheet, and never the Gantt itself.

Step 7. Selection Required

1. Check Selection Required on every line the homeowner has to choose something for: tile, fixtures, cabinets, windows, paint, appliances.
2. Attach the spec sheet, the allowance, or the showroom options to that row (paper clip icon). The client sees the attachments in the portal.

Step 8. Finalize By

1. The day you need their decision so the material arrives before the Start Date. Work backwards from the lead time: a six-week item needs a Finalize By eight weeks before install.

2. AXIOM sends the client reminder emails automatically: 7 days before Finalize By, 3 days before, then overdue notes when it is 0 to 3 days late, 3 to 5 days late, and 5 days or more. You get a copy from 3 days late on. They stop when the row's Stage is Full, and the client gets a Selection Complete email.

Step 9. Supplied By Owner

1. Check it if the client is buying the item themselves. Unchecked means the builder supplies it. The client sees Owner or Builder next to each selection.

The Stage column

Stage is the circle that fills in five steps: empty, quarter, half, three-quarter, full. Each window names them for its reader. The tracker says Not started, Start process, In motion, Working, Complete. A supplier's line says Ordered at three-quarter and On site at full. The homeowner's selection says Not Started, Start Process, In Progress, Selection Made, Complete, with Ordered beside it once it is ordered. You do not fill it while building the Gantt. Your super sets it from the tracker as the work moves; your supplier presses Mark ordered and Mark on site from his portal; you can set it here too.

Step 10. Project Control: the money, the papers, the notices

The Gantt is done. Everything else about the job you run from AXIOM: **Home → the job → Project Control**. Each card has Edit or Add; what you save is written to the job's data sheet in Smartsheet, read back, and shown to the client. You never open the data sheet unless you want to.

Client and Property	Already filled from New Project. Edit here if a phone, email or permit number changes.
Payment Schedule	Straight from the agreement: each draw, its description and amount; Add a payment for more. The total shows at the top. Tap a payment's date or status on the row to change it: Not due, Billed when you invoice it, Paid when the money arrives. The client sees the same three words.
Change Orders	Add: description, amount, date, a file if you have one. It starts Pending. The client authorizes it from the portal (or you mark it). Then Signed off when you have the signed paper (date and the signed file), Billed when you invoice it, Paid when paid. Not authorized if it dies. Authorized and signed-off change orders count in the contract total; only Billed counts as due now.
Credits	Description, amount, date. Pending, then Credited when applied. Works like change orders, the other way.
Notices	Anything you want the client to read in writing: a schedule change, a reminder, a rule about the site. Write it, tick "homeowner sees it", and it shows on the portal with the date. Untick it to take it down.

Documents	Add document: a name and the file (PDF, picture or Word, up to 30 MB, drag it in). The client sees it under Documents with a NEW badge until they open it, and gets an email. Last opened tells you if they have. Remove needs REMOVE typed.
Client uploads	Files the client sends you from the portal, when Client Uploads is on. A photo of the tile they picked, a signed form. You get an email and a count on Home's bell each time.
Selections and Jobsite Activity	What the client sees of the Gantt, and every stage change your super and suppliers made, with who and when. Read only; that is the Gantt's job.

Step 11. Turn on the portals

1. On Project Control, the **Client Portal** card: press LIVE. AXIOM makes a link and a 4-digit PIN and emails them to the client; the card then says Invite sent with the date. View Portal, Copy Link and Regenerate (a new PIN, emailed with the link) are there too.
2. Four switches on the same card: Portal, Weekly Report (the Monday email), Alerts (the selection reminders), Uploads. Turn on what you want.
3. Subs & Vendors: press LIVE on each sub and supplier. They get an email with their link and PIN. One portal per person covers every job you ever assign them. View, Copy link, Reset PIN (a new PIN, emailed with the link) and Edit are on each row; Last in shows when they last opened it.
4. **Settings** → **Supers**: add each superintendent: name, email, phone. AXIOM makes his 4-digit PIN and emails him the tracker link and PIN.
5. **Settings** → **Team**: add office staff by email and role; they get an email. Admin can do what you can except connect Smartsheet and billing; Viewer can look and change nothing.

> Done. The job runs itself from here. Change the Gantt, and everyone's view changes with it.

PART 3. THE BUILDER: EVERY DAY

The Gantt is the truth. Subs run long, things go faster than planned, weather stops you for three days. You move the Gantt, and everyone's view moves with it: the client's milestones, the subs' dates, the suppliers' install dates, Monday's email. The money and the papers you touch on Project Control.

Schedule slips or gains	Change the duration or the start date in the Gantt. The chain recalculates. Client, subs, suppliers and the Monday email all show the new dates. Nothing to do in AXIOM.
What is this week	**This Week** in the menu: every task and delivery across all your jobs, Monday to Saturday, by job, with the weather on top. Next week is one tap. The job name opens its Gantt.
Client picked the tile	Set that row's Stage circle to three-quarter; the portal shows Selection Made and Ordered. Or let your supplier press Mark ordered from his portal (his row has to be at half first). The reminder emails keep going until the Stage is full.
Material arrived	Stage to full, or your supplier presses Mark on site. The client sees On Site, the reminders stop, and the client gets the Selection Complete email.
Invoiced a draw	Project Control, Payment Schedule: tap the status, Billed. When paid, Paid.
Change order	Project Control, Change Orders: Add it. The client gets it on the portal to authorize.
Credit	Project Control, Credits.
Tell the client something	Project Control, Notices: write it, tick the box.
New document	Project Control, Documents: Add document. The client gets a "new document" email.
Client uploaded something, or answered a change order	The bell on Home carries a red count. Tap it: what came in since you last looked, newest first; tap a line and it opens.
Who is late	Home shows overdue selections per job, and the four money tiles (Contract Totals, Paid, Due Now, Balance) across every job. The eye button hides the figures when someone is looking over your shoulder.

Is everything working	Health in the menu: every job green or red with the reason. Test emails sends each automatic email to your own inbox.

Part 3b. When things change

New sub or supplier mid-job	Subs & Vendors → Add a sub or vendor. Save puts them on every job's Assigned To list; pick them on their lines. LIVE for the portal.
Sub or supplier gone	Subs & Vendors → Edit → Delete this sub / Delete this vendor (type DELETE). Off the lists, portal off. Rows already assigned to them in Smartsheet keep the name.
Client lost the PIN	Project Control → Regenerate on the Client Portal card. A new PIN is emailed with the link; the old one stops working.
New super	Settings → Supers: remove the old one, add the new one; AXIOM emails him his PIN and the link. The old one's past tracker entries stay in the log under his name.
Client wants fewer emails	Project Control: switch off Alerts or Weekly Report. The portal stays on.
Payment schedule changed	Project Control, Payment Schedule: Edit the draw or Add a payment. The total updates.
A date went red in the Gantt	A predecessor points at a row that moved or was deleted. Fix the row number and the chain heals.
Smartsheet says not connected	Settings → Smartsheet connection → Reconnect. Takes ten seconds; nothing else changes.
Trial ending	Settings → Billing. Portals, links and PINs stay the same.
New job	New Project. Same as the first one.
Job finished	Archive it from Project Control. It leaves Home, the portals and the emails; the sheets stay in your Smartsheet.
Change the template	Edit the two sheets in your template folder. The next New Project uses the new version. Jobs already built do not change.
Stuck	**Support** in the menu: New ticket, say what happened, attach a screenshot. You get the answer there and by email. Every page also has Tour this page and Show me how.

PART 4. THE HOMEOWNER

What to tell your client:

1. You will get an email from AXIOM QX with a link and a 4-digit PIN. Save it. There is no account and no password, just the link and the PIN.
2. Open the link, type the PIN. Add it to your phone's home screen so it is one tap.
3. You will see: your schedule (the milestones and where we are), your selections with the date each decision is needed by and the spec sheets attached, your payments (paid, billed, not due), your documents (contract, plans, permit), change orders, credits, and any notices. A green NEW badge marks anything you have not opened yet.
4. A change order shows Review. Open it, pick your name, and press Authorize to proceed, Not authorized, or Ask a question. No signature to draw; your name, the date and the time are recorded.
5. Reminder emails come 7 days and 3 days before a selection is due, then again if it is late. Please make the decision by that date; it is set so your material arrives before the crew does.
6. Every Monday you get the week's schedule by email.
7. If uploads are on, you can send us a file (a photo of the tile you chose) from the portal.
8. Five wrong PINs locks the portal for 15 minutes. Lost the PIN: ask us and we send a new one.

You turn all of this on with one card in Project Control. You reset the PIN there too.

PART 5. THE SUBCONTRACTOR

1. He gets one email from AXIOM QX with a link and a PIN. One link covers every job you give him, now and later.
2. He opens it on his phone. He sees every task assigned to him, grouped by job, with the town's weather on top: task, start date, end date, and the stage dot (not started, start process, in motion, working, complete).
3. There is nothing for him to press. The stages are your super's job; the portal is his schedule.
4. When your schedule moves, his dates move. No calls, no texts.
5. Pull his portal any time: Subs & Vendors → OFF. LIVE again later if you want.

PART 6. THE SUPPLIER

1. Same email, same kind of link and PIN. He sees every line where he is assigned, across all your jobs, with the install start date.
2. He can do two things: Mark ordered and Mark on site. That is all. Each one moves the row's Stage circle, and only in order: Mark ordered once the row is at half (in motion), Mark on site

once it is at three-quarter.

3. When he marks Ordered, the client's selection shows Ordered. When he marks On Site, you and the client see the material is there. You never have to ask. Every press is in the job's activity with his company's name.

PART 7. THE SUPERINTENDENT

1. Add him under Settings → Supers. AXIOM emails him the tracker link and his PIN. He adds the link to his phone's home screen and signs in with his email and that PIN.
2. He picks the job and sees its phases and tasks, with the weather for the week. He taps a task and sets the stage: NOT STARTED → START PROCESS → IN MOTION → WORKING → COMPLETE. In motion means the sub is called and lined up. Working means they are on site. Complete means done. Thirty seconds at the truck, one Save.
3. Every tap is stamped with his name and the time, written into the schedule sheet, and shown in the job's activity on Project Control and in the client's milestones.
4. Scheduling stays in the Gantt. The tracker moves stages, not dates.

PART 8. THE OFFICE

1. You add them: Settings → Team → their email and a role.
2. They get an email, sign up with that email, and land in your company.
3. Admin sees and does everything you do except connect Smartsheet and billing. Viewer sees everything, changes nothing, no portals, no PINs.
4. Remove them from Team and their sign-in stops that minute.

QUICK REFERENCE

Sign in	app.axiomqx.com
Schedule columns, in the order you fill them	Task Name · Assigned To · Duration · Start Date · Predecessors · Show Schedule · Selection Required · Finalize By · Supplied By Owner. End Date, % Done and Stage fill themselves or come from the tracker and the suppliers.
Where to type	The schedule: Smartsheet. Everything else about the job: Project Control in AXIOM (it writes the data sheet for you). People: Subs & Vendors (it writes the Assigned To lists for you).
Data sheet sections, if you open it	1 Documents · 2 Payment schedule · 3 Change orders · 4 Credits · 5 Client · 6 Notices · 7 Client uploads

Portals	Project Control card (client) · Subs & Vendors (subs, suppliers) · Settings → Supers (tracker)
Emails that go out by themselves	Portal, sub and super invites · selection reminders (7 days, 3 days, then overdue at 0, 3 and 5 days) · Selection complete · Monday schedule · new document · client upload (to you) · PIN reset · trial ending (day 21, day 28)
Help	Support in the app · support@axiomqx.com